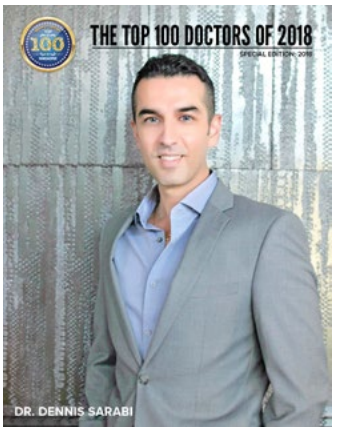
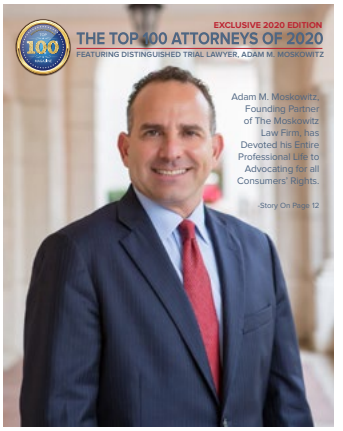
SPECIAL FALL 2021 EDITION

THE TOP 100 U.S. BUSINESS LEADERS

FEATURING DON KELLAR, FULCRUM RESOURCES ENVIRONMENTAL, INC.

THE TOP 100 MAGAZINE





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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 United States.

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 one of our finest publications 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 100 U.S. Business Leaders Magazine*.

Joseph Nunziato
CEO, Redwood Media

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THE TOP 100 U.S. BUSINESS LEADERS

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Tauhid Islam

Founder, CEO & President

I own and develop hotels in the Mid-Atlantic states. My concentration is to build and acquire premier select-service hotels located in areas with high barriers to entry where value can be added through management, design, branding, and service excellence.

Q & A

Only in America—How one man with a dream built an empire of some of the most unforgettable hotels in the country.

Growing up in Bangladesh with a love of art and design, Tauhid Islam watched as hotels decorated the landscape of the Indian Subcontinent and he dreamt of the day when his would be among them. Alas, this opportunity was afforded only to the uber wealthy, not to the son of a middle-upper-class family. Still, he never stopped dreaming. His is the quintessential story of the American Dream and how a young boy rose from dreamer to an award-winning hotel developer who is leaving an indelible mark on the American vista. From the metamorphosis of an old concrete factory into an eye-popping, oceanside retreat to the transformation of a hotel that time forgot into a sleek, modern oasis, Tauhid is the imaginative mind behind some of the most popular, Instagram-worthy hotels in the country.

As the founder, CEO, and president of Pinnacle Hospitality Group, Tauhid's hotels have been recognized with a cache of awards and featured in major publications. Pinnacle's Country Inn By Radisson Hotel in Ocean City is a *President's Award Winner;* the *Marina Bay Hotel & Suites* in Chincoteague was nominated for the 2018 *World Boutique Hotel Award* and featured in *Bethesda Magazine*, *Food Network Magazine*, and *Southern Living Magazine*; and the Cambria Hotel in Ocean City received the 2020 *Downtown New Construction Award* from the Ocean City Development Council. And he's done all this in just the first five years since launching the company in 2016 in Ocean City, Maryland. Pinnacle continues to grow through hotel acquisitions, development, and the formation of its full-service management company, opening one new hotel every year on the East Coast for the past four years while acquiring hotels in the northeast.

Prior to founding Pinnacle Hospitality, Tauhid enjoyed a successful 20-year career with Choice Hotels, beginning in 1996, on the corporate side, working with franchisees and licensees, and rising to regional franchise services director with a portfolio of 80 hotels, for which he developed strategies to improve their success. After two decades, it was time to realize the dream that had brought him to the U.S. in 1991 as a 20-year-old studying finance and statistics, and he took the last leap among the stars that had aligned to lead him here—as the founder of a firm that has quickly become one of the largest hotel developers in the Eastern Shore area.

In this special four-page feature spread, we talk with Tauhid to learn more about his journey and his thriving company—and hear the stories behind some of his most talked-about hotels.

As the founder, CEO, and president of Pinnacle Hospitality Group, Tauhid's hotels have been recognized with a cache of awards and featured in major publications.

Q: What was your inspiration for starting Pinnacle Hospitality Group?

I was in my early 20s, and I had been with Choice Hotels for four years. I was at a company convention, and when the owners walked into the room, we all stood up and clapped because they had achieved something, they were leaders. While I was clapping, that's when it hit me: How do I become an owner, where I walk into a room and people clap because *I've* achieved something meaningful? That's how it started and that became my drive. Every day, I would play that back in my head. I'm sure my story resonates with many people because a lot of times, your boss doesn't even know you have talent or they say, "You're a dreamer." But you *have* to dream. And that's what I did. I wanted to build something that was different from other hotels, and I wanted to improve my own hometown, so I started building hotels there to add something unique to the market. One thing led to another, and I've been able to build great properties in great locations.

Q: Tell us a bit more about your company.

A: I own and develop hotels in the Mid-Atlantic states. My concentration is to build and acquire premier select-service hotels located in areas with high barriers to entry where value can be added through management, design, branding, and service excellence. We work with partners, including hotel owners and investors, of which I am one. When you own, you can control all the things that you can't when you're just the management company. This is one of the things that makes us different from other hotel development or management companies. Most owners or investors stay away from ground-up, but when you build, you create something organic, and you can build it to your specifications. That's why for the past four years, we've focused on all new construction.

Q: Did you always have this unique talent for envisioning transformations of hotels or unique designs?

A: I think it's just something that came naturally to me, even as a child. When I was working for Choice Hotels, I'd walk into the rooms or the property, and the changes just came to me. I would dress every hotel up as if it were my own, and I gave the franchisees honest feedback because I wanted them to be as successful as possible. It was a true partnership. When I developed my first hotel,

Pinnacle Hospitality
Excellence in Service

Marina Bay, I took everything I wished I could do in other properties all those years and put it into mine—and I've been doing it ever since.

Q: Anchor Inn was your first project. Can you share some tidbits of the "before and after?"

A: It was an existing hotel built in the sixties and it looked like a property that time forgot—and not in charming way. The rooms had carpet similar to AstroTurf and box TVs. I purchased it, refurbished it, put in my touches, keeping the charm of the past while adding high-tech elements so that guests experienced a very quaint stay that also accommodated their modern needs. We reopened it five months later, making three times what our budget was. The property owner next door felt so good about what I was doing that he sold me the lot next door to build a new property. That's how Marina Bay got started, and Pinnacle took off from there.

Q: Just one final question before we hear the stories behind some of your hotels. What do you enjoy most about your work?

A: I love to find the perfect location. When I was a kid, I loved to draw, so each site to me is an empty canvas. For each of my properties, I just stood in front of the empty lots or broken buildings neglected by others, but I found them to be treasures of my own. I chose the colors, designs, worked with designers and architects, and each became a work of art. They're all different, colorful, cheerful, and they speak to our guests, because I take everything from the locales and put them into these buildings. When people come in and say, "Wow, this is beautiful," that gives me the greatest pleasure. As a kid, I always dreamt of doing this, but I never knew it would happen someday. Only in America is it possible to rise from an immigrant in pursuit of a dream to an individual actually *living* their dream. I hope my story inspires others to pursue theirs as well.

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Tauhid Islam

The Stories Behind the Making of Some of the Most Unforgettable Hotels on the East Coast

The Anchor Inn, Chincoteague Bay, VA

The Anchor Inn was the first. A 21-room motel off the Chincoteague Bay, not too far from the Atlantic coastline in Virginia. Even though the property was old, and the rooms had a dated smell, the serene beauty of nature was everywhere as soon as you stepped out of the guest room onto the balcony. I felt quickly in my core that the property had a lot of potential. For someone who worked for corporate America for 20 years and analyzed data and worked on theories and then advised franchisees, this could be the ultimate test. Could I bet my own money on myself and help improve my future? In a way, working for corporate America was easy, it was always someone else's money I was risking. But now it would be my own. The test began on a frigid December morning when I wrapped up the closing of the motel and stood in the parking lot, gazing at my new beginning. Soon after, the complete overhaul of the guest rooms began. Everything that I believed in, I implemented, with the focus to improve the overall guest experience and make everything better. Five months later, we reopened the renovated Anchor Inn, and the response was overwhelmingly positive, and proved what I'd always believed in: If things are done right, by keeping the guest in mind, then success would be irrelevant. When the season closed, I had doubled in just the first year the revenue that the previous owner had made all his life, and I knew that I was on to something.

The Marina Bay Hotel & Suites, Chincoteague, VA

During the Anchor Inn renovations, I watched every morning a curious old man on the next property who watched my progress. Occasionally, he'd nod or wave at me and I'd acknowledged him from a distance. One morning as I parked my car, he approached me and introduced himself as the owner of the property next door—nothing more than an old, worn-down boat repair workshop. He said he admired what I was doing in his hometown and asked if he could see some of the work that I was doing. After the walk-through, we shook hands and parted ways. Never did I know that he'd always wanted to build a hotel on his site—a dream of his father's, who in the 1970s, applied for a hotel permit to build a 74-room hotel, but it never materialized. In Chincoteague, new builds were rare as there is a moratorium on new large-scale developments because there is no public sewage. Soon afterward, this gentleman disclosed the site's history and secrets to me and said he would be happy if I could carry on his father's journey. I revived the hotel's 40-year-old permit and took over the unique journey. I found this new development to be more gratifying, as I got to leave my own signature on a blank canvas. The hotel was going to be called Marina Bay Hotel & Suites and exemplify what a boutique hotel should be. When the property opened 18 months later, it became a beacon for hospitality in Chincoteague, VA. This property is truly what I imagined a perfect hotel to be like.

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Pinnacle Hospitality
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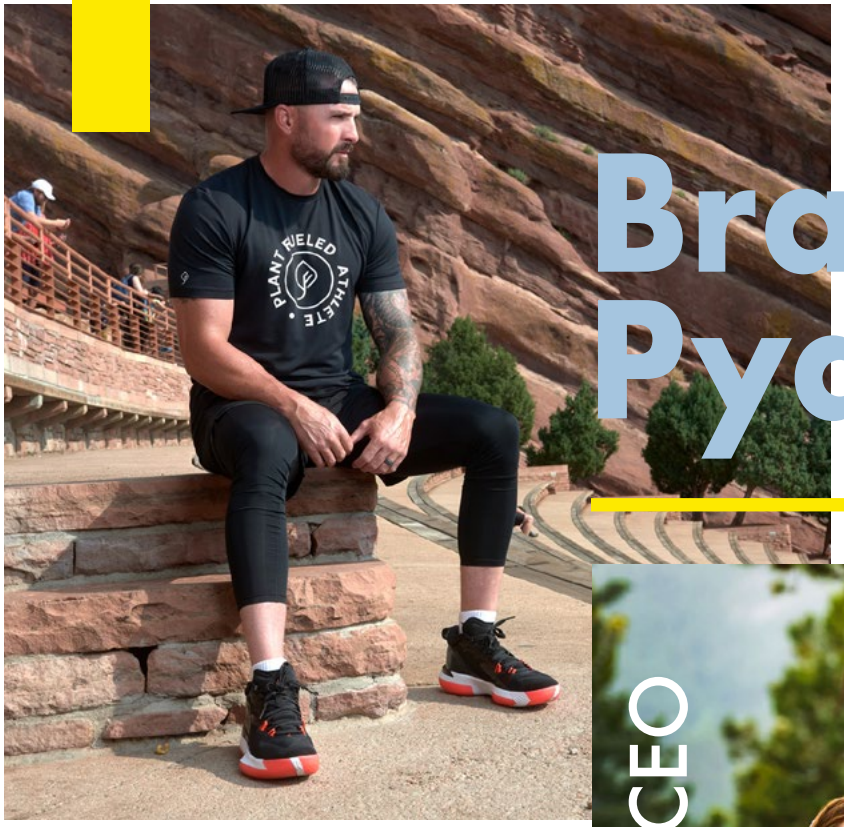
The Hampton Inn & Suites, Ocean City West, MD

The key to my success came from knowing my own backyard and by working in my own community. I believed in my market and knew that property around the ocean was where I wanted to be. One morning while driving my son to school, I saw a "For Sale" sign on an old, abandoned building not far from his elementary school. I had ignored it for many years, but for the first time saw the "For Sale" sign. I quickly pulled over and called my real estate agent. Within 48 hours, we had a ratified contract. Then the heart-wrenching information came— the property did not come with water, and it would be exceedingly difficult to get water and sewage to the property. The one thing that I'd learned in my career was to never to give up. And I did not. I found the missing water and sewage at another property that I could move there. Soon after, I found the EDUs and hired an attorney to attempt the impossible—a very rare move that had never been done on this large scale in our county's history. What was supposed to take three years took only nine months, and soon I was working on the permits to build a custom-designed Hampton Inn & Suites with colors and materials depicting our area. This Hampton Inn & Suites has turned out to be a guest favorite in the West Ocean City area and is now a market leader.

The Cambria Hotel, Ocean City, MD

While I was developing the brand-new Country Inn & Suites in Ocean City, MD, and the Hampton Inn & Suites in West Ocean City, an extraordinary, once-in-a-lifetime opportunity literally fell in my lap—one that could help shape the gateway into a city. When I was a foreign student and working my way through multiple jobs in Ocean City, my attention always fell to an abandoned concrete plant—a four-acre eyesore that "welcomed" travelers as they entered the town. Suddenly, in 2017, I found myself in conversation with a group of restaurant developers who were thinking about developing this parcel. They were looking for a hotel developer who could partner with them to redevelop this entire site. Within a few days, I had part of the parcel under contract and the process soon started. But as this was a landmark project, the permitting process took much longer, and after it dragged on for almost seven months, the restaurant group abandoned the project. This caused extreme challenges to the contract, but as a developer, I decided to continue with the redevelopment of the site. I re-strategized and focused on what I knew—hotel development. I nixed the idea of the restaurant, shifted the hotel to the middle of the site, and added additional rooms. By partnering with Cambria, my vision to develop something unique materialized. Cambria allows each of its hotels to be unique to the locale, and that was what I wanted to do. Two years later, in the middle of COVID-19, the unthinkable happened and the Cambria opened its doors. Today, Cambria has redefined the gateway into Ocean City, and will continue to do so for many, many generations.



Brad Pyatt

The self-taught senior executive has a proven talent for starting from scratch and growing small startups into multimillion-dollar companies.

Founder & CEO

While it is a challenge to succeed in just one industry, 40-year-old Brad Pyatt is a powerhouse in two. For the millions of aspiring football players, there is a 1% chance to make it to the NFL. According to startups.com, the chances of building a business to over $100 million are about the same. And he's accomplished both! The same focus and resilience he exhibited as a wide receiver for the Indianapolis Colts has efficiently been carried over into his role as a successful serial entrepreneur. In fact, the self-taught senior executive has a proven talent for starting from scratch and growing small startups into multimillion-dollar companies. Never content with the status quo, Brad is always looking to reinvent himself, to try new things, and to create award-winning brands—which he has done continually throughout his 15-year career in the sports, food and beverage, and health and wellness industries. With brands such as MusclePharm, TRUWOMEN, PlantFuel, Tasty Idea, and a variety of other brands that totaling over $1 billion in sales, Brad has been listed among the *Top 100 Influential Leaders in the Food Industry* and the *Top 50 Successful Athlete Entrepreneurs of All Time*. He has also been nominated for over 20 industry awards, including *Vegan Protein Bar of Year 2020*, *GNC's Rising Star Award* and numerous Bodybuilding.com awards:. We recently had the pleasure of speaking with Brad to learn more about his broad areas of expertise, the innovative brands he has created, and his secrets to success.

Q: Since many of our readers recognize you from the NFL, let's begin with those years. How did your athletic career help you to succeed in the business world?

A: Those years taught me the 1% rule—that if I can make it into the NFL, I can do anything. I learned how to weather storms and to thrive in chaos. Since then, I've continued to be mission-focused and to drive toward daily goals. I also enjoy problem solving, and I work well under pressure, which is particularly useful in crisis management—a common element of all start-ups. Another important take away from my days with the Colts is the importance of treating everyone with the same level of respect—from the janitor to the CEO—because we all start at the bottom at some point. That's why I say hello when walking down the hallway at work, and it's why I take time to ask people how they're doing. This is the culture I've set at my company and the ethos behind our success. You have to be about people to truly build a special company and drive culture that wins in sports and business.

Q: What sequence of events inspired you to start your first company?

A: While I was still in the NFL, I struggled to find anything within the health and wellness industry that would help with athletic performance. So, in 2010, I started MusclePharm—a public nutrition company—based upon my own needs. Before playing for the NFL, I studied kinesiology and exercise science at the University of Kentucky and at Northern Colorado University. I also learned a lot from the NFL doctors, and I knew the market, so it was an easy pivot for me to enter the entrepreneurial space. My wife helped me to start MusclePharm in our garage, and in less than five years, we grew to 300 employees and $200 million in sales. As CEO and executive director/chairman of the board, I had a vision to become a global sports nutrition brand, so I leveraged my relationships to get endorsements from major athletes like Tiger Woods, Connor McGregor, and Arnold Schwarzenegger. At one point, we had a market cap of over $350 million, and the company simply became too big for me to maintain the tight-knit culture I enjoy. So, I brought in a CEO to take over and moved on to other projects. MusclePharm is still public and is in Costco as well as many other stores.

Q: After leaving MusclePharm, did you move straight into creating another brand?

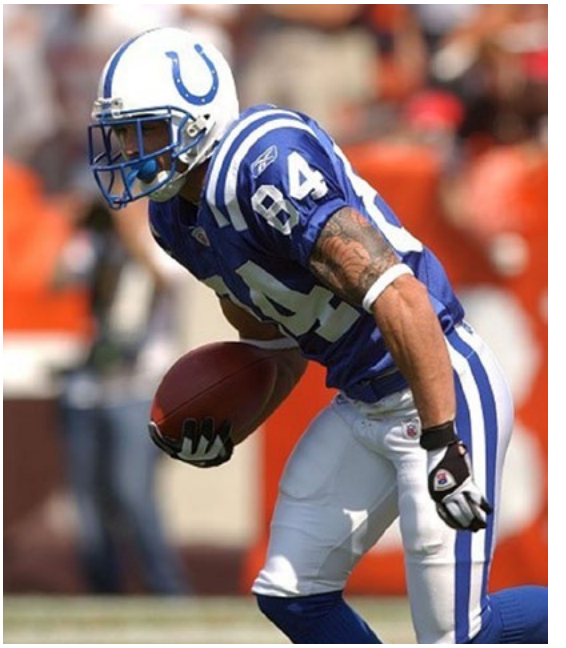
A: No, I decided to take some time off because I had young kids and wanted time with my family. I also wasn't sure what I wanted to do next. I just knew that I wanted to do something with my wife because she's my greatest ally in everything. At the time, there were few options for women, so we decided to join forces and create a business plan to address this gap. In 2016, we started TRUWOMEN under my parent company called TRU Brands. I served as CEO, and from day one, our goal was to encourage a new wave of diversity. We had a phenomenal team of women to act as president, VP of marketing, etc. They built a diverse culture, focused on women first, and got Megan Fox and Halle Berry involved in endorsing. Once again, we took a startup from nothing and turned it into a multimillion-dollar business in less than two years. Sold at both Target and Costco, TRUWOMEN won *Vegan Protein Bar of the Year* as well as an *International Nourish Award* for being among the healthiest foods in Europe. That company sold for multimillions of dollars.

Q: Didn't TRUWOMEN have a sister company as well?

A: Yes, when I sold TRUWOMEN, I extracted PlantFuel from the parent company. As president and CEO, I trademarked the name back in 2016 It was an exciting project because PlantFuel is an eco-friendly, nutrition-based brand with plant-based ingredients. Also, everything from the scoopers and shakers to the packaging and clothing line is biodegradable. Before we had time to make a single sale, the company sold for millions to a Canadian Public Company ticker FUEL, so I know Plant Fuel will be a massive hit with retailers. We recently just announced a partnership with GNC and Amazon. We also have an investor pool of celebrities and athletes, Morgan Fox, Lil Yachty, Terrell Owens. I also recently just took over as the chairman and CEO of the company and am excited to drive this forward.

Q: That's amazing! So, what project are you working on now?

A: I wanted to consult with companies and help them to scale up their brands, so in 2019, I started a brand accelerator called Tasty Idea. Two of the brands that I am especially proud of are Peels and Banana Wave. I am founding shareholder and interim COO of Peels, which started in March 2020. It's the first citrus-derived CBD and is 100% THC free! Not only do we have phenomenal ingredients and quality. Then there's Banana Wave—a type of oat milk derived from bananas. I helped another serial entrepreneur find capital for the brand, and we completed a definitive agreement, which we'll be announcing soon. Banana Wave just sold to a Canadian company, a private equity group that invests in plant-based companies.



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Q: With all the brands under Tasty Idea, do you still have time for sports?

A: Fortunately, I'm an expert in time management, so I'm still very involved in sports. I have a foundation called Cats Claw, which has raised thousands of dollars for youth and high school sports. I'm also a head coach for two football teams: one for a local high school and the other for my son's little league team. I am also the head track coach for the high school as well.

Q: So, tell us, what is your secret to success?

A: I've been around some of the sharpest minds and leaders in business and sports, and I work toward progress—not perfection. I believe that the only way to learn and grow is to sacrifice and to push through your comfort zone. Innovation is also important to me because I strive to be unique and to identify trends before they start. My products are distinguished, and I always have a product that aligns with the consumer. That's how to win in a commoditized business.

Q&A Nemanja Delic

If you were asked, "What do Apple, Amazon, HP, Lenovo, Tesla, Microsoft, Dell Computers, Sherman Williams, USPS, and FedEx have in common?" You might struggle for a response but if you own a business, or have any need for transportation services, it's an answer you'll want to know. These industry giants all place their trust in Pink Panthers Group.

Don't let the name fool you. Pink Panthers' founder and CEO, Nemanja Delic, is nothing like his humorous Hollywood counterpart and his company is nothing like any others in the industry. Nemanja is clever, inventive, experienced, and insightful—and he's redefining transportation and the culture that has, for far too long, been stagnant. From how they treat and compensate employees, to their dynamic response to the COVID pandemic, and everything in between, Pink Panthers Group is doing much more than moving freight from one spot to another.

> "Solving the mystery of your transportation needs, his success is no "whodunit."

Nestled under the umbrella of Pink Panthers Group are four entities: Pink Panthers Logistics, Pink Panthers, Inc.; Pink Panthers Technologies, LLC; and Pink Panthers Leasing LLC, all of which support Nemanja's mission to provide the broadest range of practical and essential services. While his motto is "Solving the mystery of your transportation needs," his success is no "whodunit."

Nemanja literally built his empire from the ground up in under five years. At its inception in 2017, Pink Panthers Group had just three power units, three trailers, and four employees, all working out of his apartment. Based solely on his reputation in the industry, Nemanja secured credit to rent the necessary equipment and started to build his client base. By the end of the year, he had 150 customers, 16 power units, and 18 employees. Now, through sheer will and hard work, Nemanja has cultivated more than 1,600 clients nationwide, grown his labor force to upwards of 150 and his office staff to over 50, built a fleet of 150 trucks and trailers, and opened offices in Illinois, California, Texas, and Serbia. He has also acquired a coveted position on the FedEx Custom Critical Carrier Advisory Board, which governed the shipment of pharmaceuticals and personal protective equipment and provided relief supplies during COVID.

You might say that transportation is in Nemanja's DNA. He has one brother who's been in the business for 20 years, another who is his director of finance, and an uncle who was a driver for 40 years. Even the name is a family legacy. Pink Panther was Nemanja's grandfather's favorite movie. Now, Nemanja is making all the right moves to ensure that legacy continues. Whether he is growing the business by networking across the globe, managing Pink Panthers finances, or working to provide employees with the best conditions and benefits in the industry, he remains focused on moving transportation forward.

We spoke with Nemanja about Pink Panthers Group, what they've done, and where they're going.

Nemanja, first let's talk about your four companies, and how they work together to provide the exceptional service for which you are known?

In March of 2017, I partnered with the logistics company, Millennial Logistics Force. Two months later, I bought my partner out and founded Pink Panthers, Inc., bringing the logistics company into to the new entity. From there, we started Pink Panthers Group in Jan 2021 as the main holding company. In May of 2021, we started Pink Panthers Technologies LLC because we have a great group of talented people with experience in various tech platforms. We asked every person in our organization to contribute their input on how software should be developed, and we've made a lot of progress in a short amount of time. This technology arm will help us increase transparency and give clients an even better experience than they have now. We believe that if you're not investing in technology in this day and age, you're falling behind your competitors. Lastly, we are currently in the early development stages for Pink Panthers Leasing, which was established in August 2021. We started PPLeasing to help small fleet owners within our organization get access to newer equipment for great pricing. Big companies often take advantage of smaller companies but that's not what we do. We support single owner-operators by allowing them to operate within our organization and as they become profitable, we realize mutual benefit.

What are some of the most common transportation problems and how are you solving them for your clients?

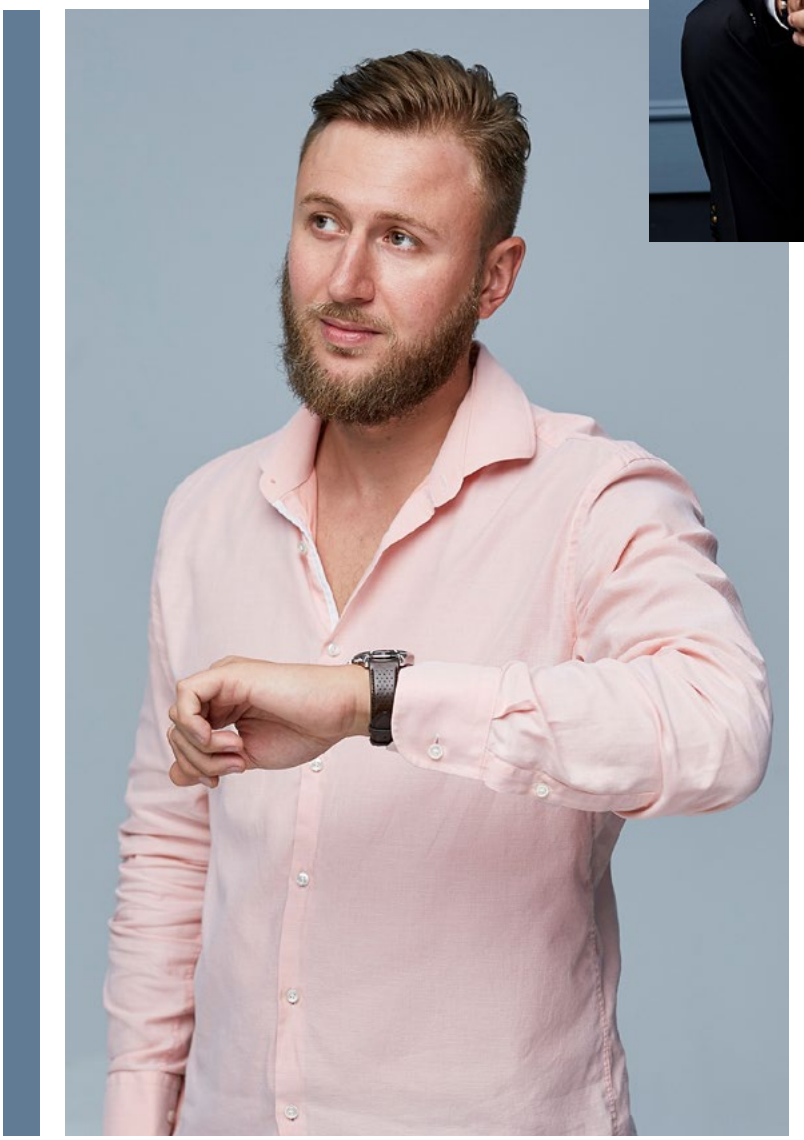
The most common problem we're seeing across the industry is a shortage of equipment and a huge influx of freight volume, especially since COVID. We're coming up with strategic solutions to keep our clients on track. Our North American network is vast, so we've been able to avoid most of the critical effects of the pandemic. For example, there is a severe shortage of drivers but we're enticing more and more drivers to join us. Because we pay above market and treat them well, they bring other drivers onboard. Compared to the industry

standard, our turnover is minimal. No doubt that the residual effects of COVID will continue to present challenges, but we are positioned to navigate the crisis with almost no negative impact to our clients.

What makes your company different from other transportation companies?

Mostly what separates us is our customers service. Our clients always come back to work with us again. Our communication is top tier compared to others, and we conduct business with full transparency. We never put money ahead of a relationship. We're one

CEO & Founder



of the only transportation companies that has five-star reviews across the board because we're ethical and treat our clients with the utmost respect. Our staff is another differentiator. We show our appreciation for their service and make sure they're never overworked. During the height of COVID, we rented a second facility so that everyone could maintain social distancing. Our industry is such that we must have people on site but even while sustaining the necessary health precautions, we had no layoffs, no pay cuts, and no reduction to benefits. I made it a point to ensure that the entire staff knew their jobs were secure and that they would not suffer lost wages. To this day, our staff appreciates our resolve and it has heightened morale. We know that our success is predicated on our staff, so we never take that for granted.

Lastly, Nemanja, what has been most fulfilling over the past five years?

Starting these companies with barely any funding and turning them into multi-million-dollar organizations that have top-tier reputations and employ hundreds of great people. I have enjoyed every minute of every day because I have the good fortune of continually learning and adapting, interacting with individuals from all over, and contributing to the transformation of the industry.

PINK PANTHERS GROUP

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PETER N. DE LEONARDIS

"Humble" and "hungry" are two words that have been key to the continuous improvement and growth that has been demonstrated throughout Peter N. De Leonardis' 10-year career. Along with the competitive edge, personal drive, and exemplary work ethic instilled in him by his father, Peter J. De Leonardis, and grandfather, Nicholas P. De Leonardis, these qualities have led to a remarkable amount of success. In fact, before reaching the age of 30, Peter was named vice president and portfolio manager at New Era Life Insurance Companies, headquartered in Houston, Texas. Since 1990, the company's multiple branches have provided quality insurance and financial products in conjunction with exceptional customer service. Within his role at New Era, Peter specializes in high-yield fixed income and works with team members to provide health plans, life insurance, and annuities. His unique perspective, hybrid of "old school" and "new school" mentalities, and unorthodox strategies have not only made him popular within the financial world, but have also led to Peter's recent victory as one of GCIF's *Top 100 Global Leaders in Finance*. He recently met with us to share more about his career journey and current role, and the advantages New Era has to offer.

NEWERA Life Insurance Companies

Q: Let's begin with a bit more about your company. What types of products are currently available to clients?

A: New Era offers quality products for every stage of our clients' lives: 24-hour accident coverage, annuities, critical illness insurance, health indemnity plans, dental insurance, final expense life insurance, GAP insurance, and Medicare supplement insurance. Our products are also backed by a commitment to keeping our clients' insurance premiums stable and as low as possible.

Q: How did you get your start at New Era?

A: My aunt, Mary Frazier, is one of the founders as well as the executive vice president and chief operating officer. Knowing her helped me to get in the door of the company, but I also had to work much harder to earn respect. I started at the bottom as an intern while finishing my business and finance degree at the University of St. Thomas, and I climbed the ranks from there. Two years later, when one of the other analysts went on maternity leave, our president and CEO, Dr. Bill Chen, asked me to step in as her replacement. That was my first step up the corporate ladder. I've always believed that if you stay focused and work hard, you will eventually see results. This has certainly been true in my own experience.

Q: How long did you work as an analyst, and what did that role entail?

A: I was an analyst for four years, doing a lot of fixed income reporting and research. New Era has departments that handle mortgage loans, so my primary focus was on the bond and equity side. During those years, I worked with other analysts, the portfolio manager, and the current CFO, Paul Mundy. Then, when the company wanted to integrate more investments and accounting, I was promoted to senior investment analyst—working more closely with the senior vice president, who was also a certified public accountant and controller.

Q: How did working as a senior investment analyst lead to your current role as vice president and portfolio manager?

A: Shortly after I became a senior investment analyst, Paul and I discovered a lot of "hiccups" in the bond

carrying values due to the residual effects of the financial crisis of 2007-2008. When I began looking at the different angles from which we could address the issues, I decided to utilize the company's Bloomberg software. I knew we needed to monitor our portfolio closely, so I plugged every security New Era owned into the software, and then created a variety of worksheets and systems that would enable us to stay on top of everything. As I went through this process, I found a new angle, which harnessed significant gains. Once these were added to our portfolio, I began to get more work and gain more trust from others within the company.

Peter specializes in high-yield fixed income and works with team members to provide health plans, life insurance, and annuities.

Vice President & Portfolio Manager

Q: Has New Era been impacted by the COVID pandemic?

Yes, but the change has been positive as I saw the pandemic as another opportunity to prove myself as a professional. Last year, at the onset of COVID, I received a statement about a Delta Airlines bond I had purchased back in October 2019. When I saw that the price had decreased, my first thought was that it was a glitch, but then it hit me—the price was dropping to non-investment grade due to the pandemic. So, I quickly put together a presentation for the CEO, showing the specific bonds New Era had recently bought, as well as some other securities that I knew would be beneficial. I also explained that certain industries would experience a lull but that they would come back tenfold. I needed to get everyone involved, and it worked!

Q: How did you go about using bonds to benefit the company?

A: I created a pandemic bond portfolio, totaling over a $100 million par and with a median yield of 11.1%, which gave New Era annual earnings of over $14 million. This is the highest annual investment income that has ever been, so I was ecstatic to have been successful in positioning both the company and myself in a much better place—especially in the middle of a pandemic. All the hard work that went into the project also led to my promotion as vice president and portfolio manager.

Q: After spending the last decade working your way up in the company, what do you think sets New Era Life apart from its competitors?

A: The company is unique because of the phenomenal people it employs. Our corporate culture was founded upon the core values of being consumer oriented, flexible, innovative, loyal, reliable, and visionary. Some of the agents for New Era are not only superstars themselves, but they have also built up the reputation of the company. A few years ago, I set out to start my own business with a friend, and although it didn't work out, I learned how difficult it is to beat the competition. It requires discipline, knowledge, dedication, and a strong team made up of the right people. At New Era, we are fortunate to have all the above.

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Meet BRANDI HYDER

The Energetic, Young Entrepreneur Whose Company is Changing the Landscape of an Industry as Old as Time.

To anyone who's ever crossed paths with Brandi Hyder, it came as no surprise that when she founded Montana Agriculture and Mining, LLC, it shot right out of the gate on a meteoric rise. She's a natural born "fixer" with an uncanny ability to see the parts that make the whole through the lens of an entrepreneur—and develop solutions where others find none. She is an imaginative innovator with an analytic mind and a mindful leader driven by the desire to help both business and community thrive. She's an accomplished hotelier who across her 17-year career operated the third largest hotel on South Beach, Miami, managing a multi-million-dollar operation and a $250 million renovation, opened the Conde Nast Traveler, the world-recognized Hotel Andra in the heart of Downtown Seattle, and The Heathman Hotel in Kirkland, Washington. Now, as the co-founder of a thriving global agricultural and mining company that has garnered international and local recognition—in less than 12 months—Brandi brings it all together to support the needs of farmers, producers, and manufacturers within the agriculture and mining industries. This is the story of an energetic, young entrepreneur whose company is changing the landscape of an industry as old as time.

> "We believe strongly in supporting the needs of farmers, producers, and manufacturers within the agriculture and mining industries, and we're passionate about our platform of helping to create community-based, self-sufficient business cooperatives."

Founded in July 2020 in Livingston, Montana Agriculture and Mining operates globally with a logistics team dedicated to seamless transportation and landing of equipment and commodities, working with partners to ensure sustainability in their products, ethics in their work habits, and the equipment necessary to support agriculture and mining. In an industry where new companies take years to develop or wither on the vine, the reputation of Brandi well preceded her, and clients approached her *en masse* as soon as the company opened their doors. Barely a year on the map, and already Montana Agriculture and Mining supports new mining projects throughout the state, serves as new vendors with the Black Butte Project, and actively supports two mines in Zimbabwe, with a third pending. As if that isn't awe-inspiring enough, they've quickly achieved large contracts in food distribution through their subsidiary, Montana Foods, with global partner, Lacryma Verde.

Settled permanently in Montana, where agriculture and mining are integral parts of the very fabric of the Treasure State, Brandi's passion for taking things apart and rebuilding them into something better took her across the country as a hotel Operations executive for luxury and boutique resorts—and back home again. From the MRK Hotel Collection on the East Coast to the Luskin Conference Center at UCLA and beyond, from massive renovations to ground up construction, Brandi disassembled operations and rebuilt them to achieve new levels of profitability. Then, in 2019, a role as Director of Operations with Columbia Hospitality in Montana called her home. Perhaps it was the hand of Destiny. Perhaps it was happenstance. Whatever the serendipitous catalyst, it would set in motion the convergence of Brandi's innate talent as a "fixer" and the deep-rooted essence of agriculture that she was born with—materializing in a vibrant company that prides itself on the Montanan spirit of hands-on, personal transactions with their partners, all while being mindful stewards of local economies. We had the privilege to sit down with Brandi to learn more about her and how Montana Agriculture and Mining's commitment to the practice of sustainability is playing a critical role in helping both companies and communities to flourish.

Q: Tell us a bit more about Montana Agriculture and Mining.

A: We believe strongly in supporting the needs of farmers, producers, and manufacturers within the agriculture and mining industries, and we're passionate about our platform of helping to create community-based, self-sufficient business cooperatives. We offer years of knowledge and practical expertise in the fields of agriculture and mining equipment support, and food distribution, and these are the values that drive both Montana Agriculture and Mining and Montana Foods. Montana Agriculture and Mining is a very progressive, innovative company that consist of a group of proud Montanans who work in collaboration with our global team partners in Southern Africa and Europe to provide mindful solutions. We're a smaller company committed to supplying our partners with an alternative to the "big business" by purchasing safe, and sustainable equipment. We intentionally keep our team small to ensure personal attention is given to our clients, and it helps us keep our costs down, which allows us to offer our mining equipment at a lower rate. This also allows us to supply dedicated ground team members to our global partners that are equally invested in global communities in which we do business, and as part of this, we support hiring locally.

Q: What services and products do you offer your mining clients?

A: We provide both equipment and talent. On the equipment side, we provide mining companies with underground support services and the nuts and bolts to allow them to mine both economically and safely while protecting the environment and their workforce. Forty-five percent of injuries and fatalities are caused by inferior equipment and support structures. We ensure that our mining projects are done with processes and products that guard against mine collapses by supplying world-class safety with underground support ancillary equipment—roof bolts, giwi bars, fully threaded bars, resin bolts, grouting bolts, mechanical anchor bolts, split sets, cable bolts anchored by resin, Z props. This is a very important distinction for us because it's not universal in the mining industry.

Q: Your commitment to sustainability, the environment, and communities underlies every service and product that you provide. How does this also benefit your clients' businesses?

A: That's a great question. Mining is inherently dangerous and harmful to the environment, but there are ways to mine where you're protecting your revenue while protecting your employees and the environment. Many mining operations are using technology and equipment that is over 40 years old. We provide the most updated equipment and precious metals that other companies need overseas to complete their projects but they don't have access to. Even if we must take a loss to purchase a safer way of completing a mining project, we will do that.

Q: How does hiring locally for your clients have a direct, positive impact on your clients' mining operations?

A: The challenge with any mining company is that they face tremendous opposition from the community, who fear the impact on the environment and their economy, and that they'll bring in a global team of workers who don't support the local community. That's not us. There is a great talent pool in Montana. We have the means and partners to source globally, but we are committed to hiring locally to support the mining operations here. By doing this, the workers—and our clients—become part of the fabric of the town not only in terms of economic contribution, but in terms of becoming part of the community and supporting it in every way. For locals who have no experience in mining, we train and license them so that they can be hired by the mines. This benefits our clients and the community, as they co-exist in harmony.

Our relationship with the Black Butte Project is a perfect example of the extraordinary benefits to a company. In the eighties, Montana experienced a couple of mines that killed the environment, and we've learned from that. Black Butte is a new copper mine that's going into Central Montana, and from a political standpoint, we knew that this mine would be put through the ringer. They needed people like us.

Q: Now tell us about Montana Foods.

A: As a former hotelier, Montana Foods was a natural transition because I had spent so many years in contract procurement, hiring, and managing logistics teams. As a food distributor, we focus on sustainable, organic, and niche products. We're enhancing the retail market by supplying the best, premium organic foods from our European partner, Lacryma Verde, in Italy, and we're expanding that market now with our partners in South Africa. Lacryma was our first partner, who reached out to us to launch their olive oil into the U.S. and Canada. We joined forces with the sole distribution rights for it, and Montana Foods took off from there. The product is available on RangeMe, a platform where grocery chains find new products, and we expect to be in major stores in North America in a few months.

Q: Let's end with a somewhat personal question. To what do you attribute your success as the leader of two thriving firms at such a young age?

A: First, my work ethic that my parents taught me. Secondly, I didn't find success on my own. I have been incredibly privileged to have mentors along the way who taught me how to be a great, mindful leader and take a project and put a proprietor's perspective on it. If not for them, I would be in a very different place, I'm sure.

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GLOBAL TRADE SUPPORT OF AGRICULTURE & MINING PRODUCTS.

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Jawad Yatim

Founder, Co-Owner, President, GM, Director of Corporate Partnerships

Jawad Yatim had played two seasons of arena football after college and knew that this was the career he wanted to pursue. Although founding his own indoor arena football team, the Massachusetts Pirates, out of the DCU Center in Worcester, Massachusetts, was his first ever endeavor, Jawad used his connections and experience, as well as his natural knack for learning on the go, and has already seen massive success since founding and starting the organization in 2017. Jawad was only 27 when he founded it, making him the youngest owner and operator in professional football, and still is to this day.

Being local and familiar with both arena football and the market in which the Pirates call home helped Jawad feel very comfortable within the business. Jawad also noted the exclusivity of the product within the market which was also something that inspired him to take the plunge, as the Pirates are the only arena football organization in New England. Since 2019, the team has tripled their multi-game ticket accounts, something that typically doesn't happen until teams have been around for considerably longer. As previously noted they compete out of DCU Center, a 14,000-seat arena, and Jawad has secured a TV deal with NESN, one of the largest sports networks in the country. Since the Pirates have begun play, they've also had numerous former NFL players join their organization, and have had the most players sign NFL, CFL, or XFL contracts in the entire country, including former Pirates DL Willie Yarbary who just recently signed with the Los Angeles Chargers. Additionally their head coach is a three-time Superbowl champion in Patrick Pass, and 98% of their players have signed NFL contract's or participated in an NFL camp, including players like Martavis Bryant, Dexter McCluster, Terrance Williams, Mardy Gilyard, Martrell Spaight, TJ Barnes, and Tre Jackson. In 2019, they also won a number of awards, including the league's *Community Service Award* and *Media Relations Award*, and Jawad was also named League Executive of the Year by the publication, "Last Word on Sports". Their short film, *Now or Never*, is a documentary-style look at the creation and development of the 2019 edition of the Massachusetts Pirates, which has been available on Amazon Prime since 2020. They partnered with Moody Street Productions, and Jawad himself also served as one of the producers. "We wanted to educate people on who we are and what we do, so we made a documentary that would live on a platform as opposed to showing on television a couple times," he says. "We're currently looking at doing another edition sometime in the near future."

But it's not just the football aspect of organization that Jawad handles; he's also responsible for the business side of things, too. When he first started, Jawad was the only full-time employee until the actual season had commenced and his coaches and players arrived in town. He formed the LLC, and handled all the logo development and trademarking, arena lease negotiations, insurance, corporate partnerships, ticket pricing and seating map, seating assignments, merchandise orders, social media, website development, marketing and media partnerships, print orders, hiring front office staff and recruiting players as well as coaches. "The couple years or so was straight 'grind mode'," he remembers. "All-nighters, energy drinks, and constantly being on the phone or looking at computer screen, or sitting in a meeting. He relied on plenty of internal motivation as he states "I was thrown directly in the fire and had no choice but to come out of it. There was a lot of people counting on me and letting them and family down was never an option." The hard work has seemed to pay off however for Yatim and the Pirates, "We've certainly grown as an organization on and off the field and it's nice to see your vision, and hard work come to fruition."

They also won a number of awards, including the league's Community Service Award and Media Relations Award, and Jawad was also named League Executive of the Year by the publication, "Last Word on Sports".

During the off-seasons, which are hectic but quieter part of the year, the organization boasts roughly 10 full-time employees, while during the season, which runs from April to September, the number swells to roughly 55 full and part-time employees, including athletic trainers, coaches, players, gameday staff and more. In addition, the Pirates have seen major growth in corporate partnerships, landing their first title sponsor in, Phoenix Communications, as well as landing partnerships with brands such as CITGO, Berkshire Bank, Bud Light and Michelob Ultra, Cornerstone Bank, BODYARMOR, Cintron Energy, and Steward Health among others. One of their partnerships is particularly unique as it is with the company named Resinate, a cannabis dispensary. This is the first ever partnership of this kind in professional football and only the second ever in all professional sports. They also have a partnership with 98.5 The Sports Hub, the largest sports talk radio station in New England.

And while Jawad is excited for the further growth of his organization, he has shifted part of his focus on some other projects as well. He is currently developing an app scheduled to be complete later in 2021, which will help streamline visits to gas stations and convenience stores for consumers. In addition to this project, Jawad and his team are heavily involved in their community for one simple reason: "It's where I'm from, I care about my hometown, and I'll be around regardless of how my team is doing."

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ANDREW J. ABERNATHEY

CEO & Founder

In business, much as in history, there are leaders and there are 'born leaders.' Andrew Abernathey is the latter. From the realization of his calling when he was in 2nd grade, to his first foray into investing at the age of 14, Andrew has been on a steady incline and his journey is still underway.

Andrew has always been ambitious and that is evidenced by both his earliest and latest successes. As a teenager, he worked two part-time jobs with the sole intention of saving enough money to invest. Unlike his adolescent counterparts, who were working less and spending more, Andrew took his first four thousand dollars and invested it in a variety of public securities. Two years later, his profits amounted to eighty thousand dollars, and he had developed a great starting perspective of the business world.

Despite a stellar launch into investing, Andrew did not slow his progress. In 2010, from the basement of his parents' North Dakota farmhouse, he and his brother started Abernathey Brothers Farm. Then, in 2012, he founded Abernathey Holdings, which raised investor funds to facilitate entry into the storage business. In just a few short years, the businesses had performed so well that Andrew had become a millionaire. Today, Abernathey Holdings has assets that include 800 units, totaling 100,000 square feet, as well as three other properties in the early stages of development. Now, at just 26 years old, Andrew is a board member with controlling interest of the company, and has accumulated a litany of accolades, including features in *AllBusiness*, *MarketWatch, BusinessCollective,* and *Fargo, Inc*.

ABERNATHEY
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We not only build and develop our own facilities, but we also own the companies that build and develop them. We own a construction company, equipment dealership, a garage door dealership, and we share realtor fees on lots we buy to develop.

The Top 100 Magazine recently spoke with Andrew to learn more about Abernathey Holding's methods and mission.

Q: What are your responsibilities as Abernathey Holding's founder and CEO?

A: I oversee the company's $100 million in assets, which I mostly manage through our four main divisions, and they in turn, trickle responsibilities down to the employees. I also spend time planning 2, 5, 10, 20, and 60 years out, to make sure we're on track for our vision.

Q: Tell us a bit more about the Abernathey family legacy?

A: Our family has been in the land, real estate, and farm business since the mid-1900s. I'm very proud of our history, so I wanted to use the Abernathey name for the company. However, great responsibility comes along with that. We use focus as our main tool for growth, and we pride ourselves on turning down most opportunities and sticking to our main two focal points: developing self-storage facilities for Abernathey Holdings, and growing our farming operations for Abernathey Brothers. Although finding contrasts between holding companies is rare, differences do exist on a certain level—a level that can compound to a large competitive edge over time.

Q: Was your family the inspiration behind starting your own company?

A: In a way, yes. All my siblings were amazing and found their individual talents at a young age, but I didn't seem to have anything that I was particularly good at—like athletic ability. So, I remember thinking, "What's *my* talent?" Then, in second grade, the elementary school created a fake town, currency, jobs, businesses, etc., and whoever collected the most money at the end would receive an *A*. Well, I ended up with the most money and businesses, and I loved it! I felt a spark, and I had natural ability, so I started investing shortly after that, and the rest is history.

Q: You focus primarily on self-storage facilities. Tell us about this.

A: We not only build and develop our own facilities, but we also own the companies that build and develop them. We own a construction company, equipment dealership, a garage door dealership, and we share realtor fees on lots we buy to develop. That's why we are able to build our own facilities for less than what our competitors pay. For example, while competitors build their facilities for $12 million, we build ours for $11 million. We also have complete control over quality, which is important.

Q: Where did the idea come from to focus on the self-storage market?

A: The idea came Gary Tharaldson, a billionaire hotel developer from ND. He's been a mentor of mine for quite some time. In the 1980s, when he started developing hotels, the industry was very fragmented. So, he embraced the brands early on: Super 8, Marriott, etc. Gary owned his own businesses—vertical integration, construction, electrical, developers—and because of this, he was able to develop hotels. A new one would open every nine days! Eventually, Goldman Sachs bought him out. Gary helped me to see that the self-storage industry today is fragmented (owned by mom and pop) just as hotels were in the 1980s. So, I decided to copy his model and apply it to self-storage. Gary once told me something I will never forget. He said, "Wealth is built on focus; wealth is preserved on diversification."

Q: Do you see ongoing growth in consumer demand for self-storage facilities?

A: Yes. I'm seeing an overwhelming demand. Our average units are 120 square feet and about 2.5 miles from where our consumers live. Statistics show that most of the population will live in large cities within the next couple of decades and that the average family is choosing to live in less square feet than in the past. So, need is steady and will increase. Also, we have Amazon online store owners as our clients,

and they use our facilities to house and package their merchandise. We have Amazon lockers in all of our lobbies, and we continue to focus on catering to their wholesalers and others in the online marketplace.

Q: What are the criteria for where you build storage facilities?

A: We have 5 strict criteria: 100,000 people within a three-mile radius, household incomes of $100,000+, an obtainable rental rate of $1.70 per foot or more, high visibility from a main thoroughfare, and sites that are not surrounded by undeveloped land.

I don't mind spending 10% to 20% premium for a lot because I would rather give up two years of profit to make sure we have the best locations for decades to come.

Q: Lastly, Andrew, what drives you? What do you find most fulfilling about your work?

A: I love the challenge and I like being in control of my own destiny. I love being the boat that can create large waves for all the boats behind me—employees, partners, and team members. I get excited about building something that's bigger than me. I'm also inspired by my family history. We've been farming since the mid-1900's and my success is in part, an homage to their legacy.

Reginald Reed
Chief Executive Officer

The Evolution
Of Employment

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Reginald Reed lives by the creed, "Consciousness creates reality." He is driven by the belief that our energetic thoughts and intentions can have a dramatic impact on our surroundings. So, at age 31, the Wisconsin native ended a successful 13-year career in the construction industry and set out to return principle and passion to all areas of employment. Just one year later, in 2016, he founded Mindful Staffing Solutions, LLC—a free, sustainable, technical college platform headquartered in Milwaukee. Attached directly to employment and supportive services, the platform was designed to be profitable as well as duplicable and has already moved hundreds of individuals out of poverty and into sustainable careers without government assistance. As CEO, Reginald battles poverty, unsatisfactory race relations, and economic inequality through the strategic design of private commerce business models, which provide adequate training, education, and career opportunities for underserved communities across the country.

To further support this noble mission, in 2018, Reginald founded Mindful Measures, Inc., a Milwaukee-based software development company that specializes in products that help to create unbiased conditions for hiring, paying, promoting, and terminating within the workforce. Using a proprietary software system, the company produces a real-time résumé—a performance-based, data analytics résumé that drives unbiased hiring decisions. Reginald holds numerous responsibilities within both companies, which include process implementation and improvement as well as system design, software architecture, business development, and workforce performance data analytics. In recognition of his efforts, he was selected as a recipient of the *2016 Wisconsin Job Honor Award,* and *Milwaukee Business Journal* named him a *Power Broker* in 2019. He was also listed among *Fortune's Future 50* and *Milwaukee's 40 Under 40.* We recently had the honor of meeting with Reginald to discuss the Mindful companies, their services, and the clients they assist.

After working as a building tradesperson, what led you to change paths and launch your own staffing company?

Like so many others, the construction industry is subject to bias. I was the only black person at a lot of building companies, so I saw many barriers over the course of my career. When I finally made up my mind that something had to be done, I was at the highest level of my job as a commercial roofing envelope specialist, project estimate management, with financing that

would have exceeded $600,000. At the same time, in my personal life, I was learning about human consciousness and how to be a selfless, egoless person. Through that process, I ultimately realized that businesses have egos just like people, and I decided to create a business that could serve while also being profitable. That's how Mindful Staffing was born.

For what sectors do you provide staffing?

We provide staffing services for skilled trades—construction, electrical, plumbing, etc.—the medical industry—positions such as patient transport, CNA, CBRF, and others—and environmental technology. We also provide free training for all these areas, and we're working on adding a medical assistant training program. Our mission is to create free college, and as we expand our training, our goal is to serve every industry.

What types of educational courses do you provide?

All the courses we offer are free, and they include medical training, building and construction, driver's ed., and high school equivalency. Also, once the COVID-19 pandemic is under control, we will be opening our manufacturing and hospitality training courses.

That's wonderful! What are some of the tools you've developed for creating unbiased workforce environments?

Since we were founded, we've been using the Real-Time Résumé, which was developed through our sister company, Mindful Measures. A Real-Time Résumé is the end product of REIGN—our real-time employee intelligence gathering network. REIGN is time and attendance combined with performance metrics and business intelligence, the three components that produce the Real-Time Résumé.

What benefits does a Real-Time Résumé provide clients and employees?

It gives both employers and employees a clear understanding of their value based upon their performance. The unique part is that a Real-Time Résumé does not include the names or faces of candidates—it shows only their metrics. This format is beneficial to all parties involved because it makes the hiring process unbiased and performance driven. It also results in faster hiring, higher retention, a healthier work environment, fair pay, an optimized workforce, and an improved bottom line.

Now, tell us a bit about Mindful Measures, Inc.

Mindful Measures is a software development company focused on metric-driven workforce decisions. Our goal is to push the world toward making unbiased decisions when hiring, firing, paying, and promoting employees. We do that by keeping the focus on performance data and data analytics. Through Mindful Measures, we're currently building Real-Time Résumé software that other companies will be able to use in-house. When I tell people about the software, I explain it this way: "With a Real-Time Résumé, a woman will never again be passed over for a raise due to her gender because she will be backed by her metrics." If used properly together, the Mindful Staffing model and the Mindful Measures model can solve workforce issues of any city.

I DECIDED TO CREATE A BUSINESS THAT COULD SERVE, WHILE ALSO BEING PROFITABLE.

Would you like to share a memorable example of someone you've helped?

I have a lot of examples, but one in particular that comes to mind is a man named Branden. At the time, he was an expectant father who never had a strong example to follow or any skills to help him prepare for a career. After coming to us, he is now fully sustained with a family-supporting life and career that he wouldn't trade for the world. His baby is now two years old.

What do you enjoy most about your work?

I enjoy the fact that the impact we make in people's lives is compounded. For example, when I teach someone like Branden, he, in turn, teaches his son a trade. Seeing the generational impact that we're making is the most fulfilling part of job. That's what drives me. The training and free college are helpful to the world, and to neutralize biased hiring practices through our software is a true privilege. I believe wholeheartedly in the words "when old patterns are broken, new worlds emerge," and to know that we're helping to open new worlds to so many people is tremendously fulfilling.

Craig Goodliffe

About

Having spent nearly 20 years in the real estate industry and more than 10,000 hours coaching and training business owners, Craig Goodliffe holds an in-depth understanding of the responsibilities they bear as well as the challenges they face. In January 2018, his valuable insight led him to create Cyberbacker, a leading provider of first-class administrative support services “from anywhere in the world to anyone in the world.” The Utah-based company provides virtual services around the clock to busy professionals, entrepreneurs, and businesses allowing them to lighten their workloads and reach higher levels of success. Team members, known as cyberbackers, help to complete time-intensive tasks. From setting appointments, creating documents, and managing social media to transcribing, researching, sales marketing, and more, Cyberbacker’s group of dedicated experts take care of it all so that their clients can concentrate on the critical aspects of their businesses. Craig recently spoke with us to share more about Cyberbacker, its unique profit-sharing program, and its evolution into a thriving global enterprise.

Q: What led to your transition from real estate into administrative support services?

A: I joined the real estate industry in 2002 and launched The Good Life Group in 2012, where the concept of Cyberbacker was first started and implemented. A few years later, I decided to become a real estate coach, and as I learned more about my clients’ challenges, coaching became less about selling real estate and more about hiring people to help run the organizations. I began hiring people out of the Philippines in 2012. Later, in 2017, another real estate coach asked what I was doing differently because she was working all day every day, and I seemed to have more time. When I explained that I had an assistant, she asked if I could help her find one as well, which I did. A short time later, another friend asked for help in hiring an assistant and it evolved into a business from there. The first person I helped said that her assistant saved her 15 to 20 hours per week in work, and the second person said they loved their job much more because they were finally able to handle the workload. Hearing their positive feedback made me happy, and I knew I wanted to do more to help business owners, so I began expanding Cyberbacker so that I could serve more clients. Although most of our cyberbackers are based in the Philippines, I believe that equal opportunities should be given to all, and that great talent can be found anywhere in the world, and as soon as we can establish legal entities in other countries we plan to do so.

Q: Your company has experienced tremendous growth in just three years. To what do you attribute this?

A: We have, and it’s been an exciting journey so far! Today, we serve more than 1,000 satisfied clients, and my goal is to continue creating the greatest number of jobs possible. In 2018, Cyberbacker began with 120 cyberbackers, and we set a goal to hire 200 the following year. However, we saw that number double in 2019 with 259 newly created jobs. Our goal for 2020 was to hire 400 cyberbackers, and we ended up hiring 870 people.

I think the pace of our growth is reflective not only of our commitment to our clients and the breadth of expertise that our team brings, but of our unique business model. We strive to partner great individuals

to clients who share their same values because like-minded individuals working toward the same goals have the highest capacity of growing. Therefore, our administrative support services not only lighten the workloads of business leaders, but they also help to improve their companies.

Q: What are the benefits of becoming a cyberbacker?

A: There are several. Our company provides a way for people to improve their skill sets, collaborate with others, and contribute to the greater good. As an added bonus, cyberbackers are free to work from home, which means no dress code and more time to spend with family. Our cyberbackers are also guaranteed to be paid on time with no hassle or delays.

Q: Tell us about your profit-share program.

A: When I first began to travel to the Philippines, I saw street children selling flowers just to get money to eat, and it was a real wake-up call for me. I realized these kids needed my help, and I resolved to create more jobs. However, I quickly learned that most of the cyberbackers we hire are responsible for caring for their whole family, so I began thinking of ways that we could help them, as well as their families. I know people would help if they had something to give but the truth is you can't give what you don't have. That's how I came up with the idea to structure a profit-share program. My goal was to profit-share $50,000 in 2020, but we were able to structure far more—$226,000. The program has a five-year vesting period, and cyberbackers receive shares based upon the company's profits. We're currently the only online-based company with a profit-share program that I know of, so that makes us very unique. Right now we have a lifetime profit share of over $600,000.

Craig's valuable insight led him to create Cyberbacker, a leading provider of first-class administrative support services "from anywhere in the world to anyone in the world."

Q: In what other ways does Cyberbacker set itself apart from the competition?

A: In addition to our profit-share program, we're franchised. When people began asking me how to implement Cyberbacker into their industries, I franchised the company. This allows us to use our various processes—hiring, training, etc.—throughout other industries. Cyberbacker is also the only company with two legal entities in the Philippines. Although there are other companies attempting to do what we do, they have no legal jurisdiction there.

Q: How do you spend your time outside of the office?

A: I'm always reading, listening to podcasts, attending seminars, and working to improve myself. I also enjoy giving back through charitable outreach in the Philippines. We support The House of Hope, and we've donated money to orphanages there. We also funded a basketball team, and we held a large gathering where everyone can hang out and be social. That's what we're all about—building partnerships and helping people succeed in life.

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Tri Ma

> I don't want to be helping people out of their lives; I want to be helping people into their lives.

Hailing from a family of successful entrepreneurs, Tri Ma has always possessed a passion for helping people—a desire that ultimately led him to the insurance realm. With nearly two decades of experience, the seasoned insurance advisor advocates for his clients, providing education and expertise to look out for their best interests and to protect them through the different stages of life. In May 2008, Tri founded 3T Insurance, LLC, an independent, full insurance brokerage headquartered in Westminster, Colorado. With a focus on personal lines insurance, the agency offers an array of products, including home, auto, and commercial policies, with specialization in Medicare and life insurance. Licensed in eight states—Colorado, Arizona, New Mexico, Texas, Idaho, Pennsylvania, Florida, and Missouri—3T's select team of agents serve thousands of clients, providing an assessment of their insurance needs and a choice of packages that fit them best. We spoke with Tri to learn more about his unique firm and how his determination to improve people's lives manifested into a thriving, award-winning company named as one of the *Best Car Insurance Agencies in Westminster* in 2021 by Expertise.com and ranked among the top 2% in the nation as a *United Healthcare Platinum Premier Producer.*

Q&A

What compelled you to start your own company, Tri?

I've always felt this deep desire to help people, and growing up, I dreamed of becoming a doctor. One day during my pre-med undergraduate studies, it struck me, "I don't want to be helping people *out* of their lives; I want to be helping people *into* their lives." Shortly after that revelation, I was offered a job with Farmers Insurance Group and started my own agency there. But I felt that I wasn't giving the best service I could while being restricted to products from only one company. I wanted to provide them with a universe of options that would serve them best. So, I joined a brokerage and learned everything I could about that channel. I fell in love with it and was a top performer right out of the gate. A few years later, I took my skills, experience, ideas, and work ethic and launched my own company—all while finishing my MBA in finance. As I progressed through my career, my clients moved with me, and many followed me when I launched 3T Insurance.

How is 3T different from other independent brokers?

I always have an eye on market trends and changing consumer needs. We offer the option to fill out a form on our site and provide immediate, *actual* quotes from a variety of companies, but we're also very hands-on and work closely with our clients to understand their unique needs beyond the information they provide. Most companies require people to maneuver a long online process only to receive the message "An agent will call you," or, worse, the firm sells their data to third parties. We shop *for* our clients, and we never sell their data. We're also different because we offer dedicated agents and insurance carriers, many of whom can service our clients after hours. For us, it's quality over quantity. It's about

the people we serve, many of whom have been with me for years, and our retention and referral rates are very high. In fact, most of our business comes from referrals from our happy clients.

You also focus on educating clients on insurance options. Why is this important to you?

For many people, choosing the "right" plan can be a stressful and frustrating process, and the policy language is convoluted and complex. I believe it's incumbent upon us, as agents, to explain it in a way that people understand so that they can make an educated decision. We really look out for our clients by helping them understand the "why" behind what they have and the reason behind the coverage they need. In doing so, they trust us, and we embark on a long relationship, serving their current and future insurance needs. We focus on value—not price—and we help them understand how to use their policy properly. They also know they can call us with any questions or problems.

What made you want to specialize in Medicare and life insurance, specifically?

I enjoy being able to make an immediate, profound impact on people's lives. An encounter with a client early in my career really solidified my decision to specialize in these areas. Like so many people I've served over the years, in a single meeting, I was able to assist her in getting all the help she needed and more. She couldn't afford to see a doctor or get her medicine. We reviewed her situation together and I said, "This is what you qualify for, and this is the ideal plan for you, and why, and this is how it works. Let's get you on these other programs that will help you out even more." She literally cried because I was so helpful.

Life insurance can be equally complex, and I take a great deal of time to explain the differences and understand each individual's unique needs. There are many life insurance policies out there, and it's not "one size fits all." We match the right product with the right person that serves their best interests. I spend as much time as needed with each of my clients, and they don't have to pay me. When things are done right, you can have rich benefits for life.

What do you enjoy most about your work, Tri? What drives you?

What I enjoy most about my work and what drives me is the Medicare, health, and life insurance part. It excites me that I'm getting to know my clients on a personal level and helping them improve their lives—whether through peace of mind or financial freedom. It all starts with proper planning and execution from a solid platform. Underlying it all is my desire to help people.

President & Founder

We really look out for our clients by helping them understand the "why" behind what they have and the reason behind the coverage they need. In doing so, they trust us, and we embark on a long relationship, serving their current and future insurance needs.

Tri holds a bachelor's degree and an MBA in finance and is a member of the National Society of Leadership and Success. Named UHC Medicare and Retirement Rookie of the Year and now, Platinum Premier Producer since 2020. He holds licenses in both life and health and property, and casualty and is Medicare certified.

Kamel Ghribi

Chairman

Kamel has been actively involved in the promotion of diversity, peace, and dialogue as well as the right for all to gain access to universal health care and education.

As the leader of four thriving organizations, Kamel Ghribi has built his career around the belief that the business industry can make a difference in the world by investing in sectors that provide support and services to entire nations. He has diligently worked to bring benefits to the areas in which his business activities are based with a particular interest in the MENA region and Africa. Today, he is chairman of Swiss-based GK Investment Holding Group, president of GKSD Holding Italy, president of GSD Healthcare Middle East, and vice president of GSD—one of the largest health care providers in Europe. Kamel is also the founder and president of The European Council for Africa and the Middle East (ECAM.) Over the course of his career, he has been actively involved in the promotion of diversity, peace, and dialogue as well as the right for all to gain access to universal health care and education. Kamel's other areas of interest cover health care investments, R&D, and sustainable development. He recently met with us to share more about his international background, career journey, and firm belief that anyone can make a difference and achieve success.

As a young man, what inspired you to leave your home in Tunisia?

When I left home to study abroad, my mission was to help communities benefit from my experience. Going to a new country can be daunting, but I managed to become the VP of the largest Italian private hospital group – Gruppo San Donato (GSD), as well as the chairman of GSD Healthcare Middle East and Africa and chairman of GKSD Holding. With 54 countries, Africa can be especially challenging as far as marketing and encouraging investment goes, however, I've been successful in gaining support in both the private and public sectors which of course results in providing benefits and services to people throughout the world.

How did you manage to overcome the many challenges you faced?

I have my nation of birth to thank for a large part of my drive to succeed. Being a North African in the 1980s didn't carry the same advantages as being Saudi, Emirati, Swiss, or English. We had to fight harder to achieve international success and recognition, and we faced many more barriers than our European or American counterparts. I also believe that I had to be best at what I set out to do, which resonates with many successful female entrepreneurs, politicians, diplomats, company directors, and others.

To what do you attribute your success?

Once you remove talent and drive from the equation, luck plays a huge part in anyone's success. I was fortunate enough to meet the right people at the right time, and they provided me with opportunities to prove my worth. My motivation most certainly came from the high price I had to pay for my success—leaving my homeland and the safety, support, and love of my family to face a hostile world that takes no prisoners. This awareness has always grounded me and resulted in a deep recognition that you must not let those who have faith in you down, but most of all, you cannot let yourself down.

What projects have you been working on since the onset of COVID?

My main project since COVID-19 started has been to promote strategies that will provide universal health care in the regions where it is most needed, especially the Middle East and Africa. In conversations with African and European leaders, I constantly stress the need to open an honest dialogue about healthcare, for example create more jobs and avenues for new professions. Earlier this year, I also pushed for a pediatric cardiac machine—the first ever in Africa—which allowed for better health care, hope and optimism about the provision of care.

If a country needs hospitals or infrastructure to support it, then our holdings provide a package that includes infrastructure, professional support, compliance, and capital through a special investment vehicle to attract investments into that sector.

GKSD
INVESTMENT HOLDING

You have committed a significant portion of your life to philanthropy. What charitable projects do you currently have underway?

I'm dedicating more and more of my time to finding opportunities for others, who, like myself, are eager to succeed in business. I especially seek to support the MENA region and Africa as I feel now is the right time in my life to give back to the places that gave me so much—not only as a philanthropist but also as a successful businessman who has much to share in terms of experience and professional networks. I also want to give back to Tunisia, the land of my birth, to make up for all the time I've spent away. Tunisia has suffered much through the years, and the COVID-19 pandemic has only served to cause further suffering. Instability in Libya has also caused tremendous hardship to Tunisia, and my dream is to see the entire MENA region enjoy stability and economic prosperity during my lifetime. I believe that if there is a serious political and social will, then no barrier is insurmountable. My most recent contributions were donations and personal protection equipment (PPE) for Algeria and Tunisia.

What advice do you have for those just entering the business world?

I encourage them to follow their dreams and to help make the dreams of others come true as well. I believe that once you see what people need, you can invest in places that are important, such as the health care and agriculture sectors. This allows you to see from other perspectives and to create services to fill in the gaps. For example, I'm in both the energy and health care sectors, and my holdings are also involved in infrastructure and construction. The services I provide are packaged in a unique way. For instance, if a country needs hospitals or infrastructure to support it, then our holdings provide a package that includes infrastructure, professional support, compliance, and capital through a special investment vehicle to attract investments into that sector. Essentially, wherever you come from and whatever position you hold, you can make a difference.

CONTACT

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Alana Dzurek

For Alana Dzurek, what started nearly 20 years ago as a leap of faith, ultimately transformed into a lifelong mission to rebuild people's confidence and change their lives. While working as an unfulfilled executive assistant in corporate America, she made the monumental decision to explore electrolysis, a profession she knew nothing about. However, as Alana became more involved in treating difficult cases, she began to develop a large base of transgender clientele whose stories both touched and inspired her. She then realized that the hair removal business was much more than a career choice—it was her calling. Devoted to offering faster, pain-free solutions for permanent hair removal, Alana founded Beverly Hills Hair Free in 2011. The California-based company has since helped millions of people, and the Beverly Hills Hair Free System of permanent hair removal is now internationally recognized as the gold standard. As a leading expert in her field, Alana has contributed to HairFreeLife.com and has been published in *Beverly Hills Magazine* & *Voyage LA*. She was also named one of the *Top 10 Inspirational Entrepreneurs to Look Out for in 2021* by *Disrupt Magazine*.

Because unwanted hair is a global problem that crosses gender, cultural, and geographic barriers, Alana receives countless texts and emails from people throughout the world who have heard about her revolutionary system and are eager for her to come to their area. While the company's main location is on Wilshire Boulevard in Beverly Hills, she is currently in the process of opening a second location in Dallas, Texas. Also, through licensing and distribution deals, Alana plans to expand nationwide and then internationally within two years of launching the company's new cutting-edge electrolysis equipment. *The Top 100 Magazine* recently had the pleasure of speaking with Alana to learn more about her one-of-a-kind approach, groundbreaking technology, and the millions of people she has empowered through permanent hair removal.

What is a typical day like for you as the company's founder and CEO?

My responsibilities are massive—from seeing patients to hiring to overseeing my staff to managing the daily responsibilities of running a company. I've also recently partnered with a team of engineers and marketing experts, and we're in the process of launching our new Electrology devices as well as a training program that will be available worldwide.

Tell us more about your role as an inventor and the EPX36 that's currently under development.

I set out to build equipment six years ago because our supplier shut his doors. No one else was making the equipment we currently use, so I put word out that I was looking for an engineer

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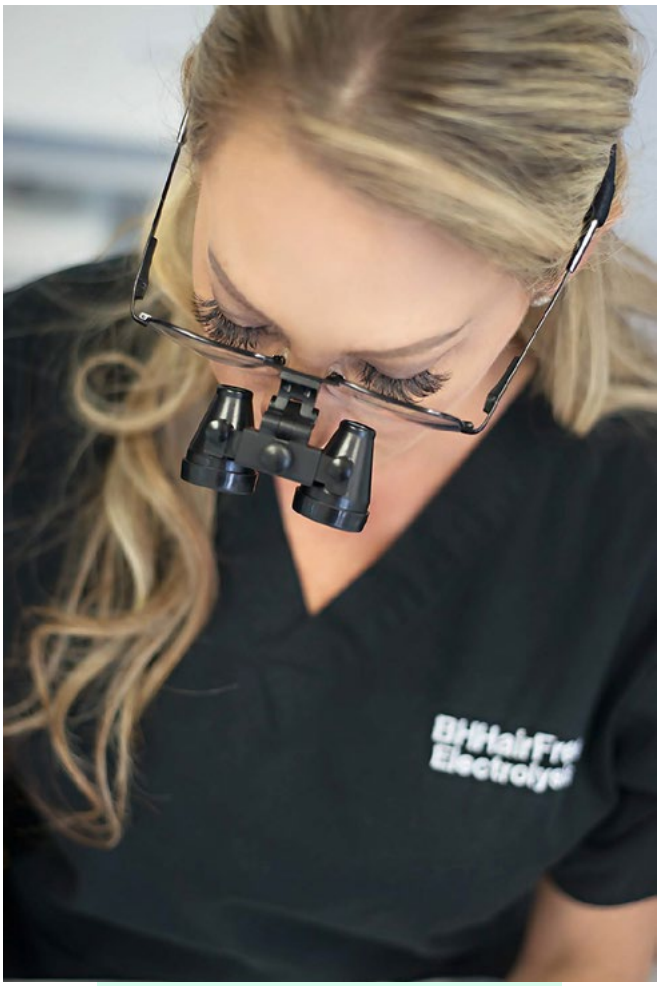
to build our own. After many dead ends, I finally came across some amazing partners and we formed Electrology Tech, LLC., the hardware and product division of my company. People say, "Necessity is the mother of invention," and it really is because I felt like I had the weight of thousands of people on my shoulders—people who needed my help. We began working on a digital electrolysis system called EPX36. It's currently being tested by our in-house team of engineers, and it should be ready for market in the fall, along with a variety of tools and accessories. I consider the EPX36 my gift to the world because I wanted to help those I couldn't reach across the globe.

How does your method of Electrology differ from traditional electrolysis?

This is not your grandmother's electrolysis—there is no laser, and no one is sitting in a chair having one hair pulled out at a time. Our method of Electrology utilizes 16 to 32 probes simultaneously and it's permanent. We can treat any skin type and hair color, eliminating hair 30 times faster than traditional electrolysis. Our system also effectively eliminates hair stem cells, so there's never any scarring or damage to the skin. We use galvanic electrolysis, which creates lye inside the follicle to limit the re-growth rate up to 70% less than thermolysis. The advantage of our system is that patients can tolerate longer treatments with less frequent visits. In contrast, traditional electrolysis uses only one probe at a time, and most electrologists use thermolysis (heat similar to a laser), which results in tremendous re-growth.



CEO & Founder

We use galvanic electrolysis, which creates lye inside the follicle to limit the re-growth rate up to 70% less than thermolysis. The advantage of our system is that patients can tolerate longer treatments with less frequent visits.

Hair removal goes far beyond the desire for aesthetic beauty, and you've witnessed how it has changed people's lives. Can you share a few memorable experiences with some of the clients you've helped?

The first that comes to mind was a transitioning client who had battled bone cancer since childhood. She was super-thin, needed oxygen, and wore a wig. I told her that I was happy to perform the hair removal but wanted to work on getting her weight up so we could safely put her under aesthetic for the procedure. However, she wanted to get the procedure done quickly in case she didn't make it. She said, "Even if I live as a woman for one day, it will have been worth it." I cried. You just don't forget a case like that. Another client came to us with hair growth that was relatively small compared to those I usually treat. So, I asked why she wanted to get it removed. She said, "I'm being made fun of all day at my job, in stores, and out in the world. I just can't tolerate it anymore." She exemplified how unwanted hair can shatter and undermine a person's self-confidence, affecting their productivity, social lives, and overall happiness. After we did the procedure, she felt so relieved that she cried. She was set free.

What do you enjoy most about your work? What drives you?

I love helping people and looking for ways to improve myself as well as the industry. My job is easy when I know I'm making a difference in people's lives. So, the thousands of people across the world who need my help—they're the ones who underlie my determination, and they're the ones pushing me every single day.

Alana holds a business and marketing degree and studied an advanced curriculum with her mentor, a pioneer of multi-probe electrolysis. She is also a member of the Summit Surgery Team, a professional network of surgeons, anesthesiologists, and doctors who facilitate treatment for a variety of medical conditions.

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Dave Panana

The Health Care Leader on a Mission to Make a Difference in the Lives of Native Americans.

Born in New Mexico, Dave Panana was raised on both reservations of his parents, his mother from Zia Pueblo and his father from the Pueblo of Jemez. With the humble lessons of his youth serving as the foundation for his worldview and work ethic, Dave has invested 17 years in his health care career and he's experienced the direct provision of care to patients as a nurse as well as more complex roles in designing, building, staffing, and improving/expanding health programs serving Native Americans and addressing the historical health disparities within their populations. He now serves as the chief operations officer of the Kewa Pueblo Health Corporation (KPHC), and the co-founder and chief executive officer of Owl Springs Consulting, LLC (OSC).

After receiving his BSN in 2002, Dave began a decade-long nursing career in cardiac and telemetry units for major medical centers and hospitals across New Mexico. In 2009, he assumed leadership positions with Pueblo of Jemez Health & Human Services (JHHS), where for the next five years, he sought to expand available health care services, decrease costs and increasing third-party revenue. At the same time, he kept his hands on the heart of it all—the patients—supervising medical staff and updating nursing policy and procedure, all while seamlessly executing his duties as co-chair of the Safety & Infection Control Committee, a member of the Medical Executive Committee, and chair of the Performance Improvement Committee. In 2012, he and his Medical Director led the completion efforts toward accreditation of JHHS by the Accreditation Association for Ambulatory Health Care (AAAHC).

Located on the Santo Domingo Pueblo, KPHC is a growing P.L. 93-638 tribal health program that provides comprehensive health services to all eligible Native Americans in the surrounding communities, including medical, dental, pharmacy, behavioral health, optometry, lab and radiology services. Since 2014, Dave has committed his talent and resources toward the realization of KPHC's mission to "ensure health and wellness through excellence in healthcare, with respect for culture."

As a highly visible executive within the organization, Dave's leadership and contributions have led directly to the achievement of numerous corporate goals, including full program accreditation by the Accreditation Association for Ambulatory Health Care (AAAHC), a 257% increase in third-party revenues and a 157% increase in organizational value as measured by assets and equity, the rapid expansion of KPHC's facilities and staffing patterns, implementation of a new electronic health record (EHR), a 133% increase in total patient services provided per year, and four consecutive years with no annual independent financial audit findings.

Dave is also a dynamic presence on state and national levels, where he advocates tirelessly for partnerships and initiatives to improve the entire system in which health services are delivered to tribal populations. His active appointment to entities such as the Native American Tribal Advisory Committee (NATAC) in the State of New Mexico and the Tribal Technical Advisory Group (TTAG) for the Center for Medicare and Medicaid Services (CMS) provides him access to high-level discussions and the opportunity for direct input into federal and state policy decisions. Most recently, Dave, the CEO, and the Board of Directors led an executive initiative for tribal consultation with the State of New Mexico resulting in a Medicaid State Plan Amendment (SPA) that is estimated to secure over $55 million dollars in additional resources to Native American programs FY 2021, and over $83 million dollars in FY 2022.

As an engaging presenter who blends the simplicity tradition with data-driven aspirations for growth and improvement, Dave is an accomplished speaker who has shared his wisdom in conferences sponsored by entities such as the National Indian Health Board (NIHB), the Indian Health Service (IHS), and the National Indian Child Welfare Association (NICWA). For his leadership and commitment, he's been honored with the *2015 Indian Health Service Director's Award (organizational)*, *2017 National Indian Health Board's National Impact Award*, and *2018 National Center for American Indian Enterprise Development 40 Under 40 Award*. We had the honor of talking with Dave to learn more about KPHC, his consulting firm, and his ongoing work to improve access to health care for Native Americans and Alaska Natives.

Tell us the story of the serendipitous events that led you to a nursing career, and, ultimately, to your current role with Kewa Pueblo Health Corporation.

I wanted to go into medical school to become a doctor. My first choice was University of New Mexico, but I'd already been accepted to New Mexico State University, so I decided to go there. When I arrived, the guidance counselor told me they didn't have a medical school, but I could start with initial classes there and transfer to med school. The other medical degree they had was nursing, which I selected, and I never looked back. During my nursing career, and then my leadership roles, I developed a greater understanding of the systemic issues and challenges facing both the patient and health care organizations. I have always felt health care administration was about politics and money—and I still do. As COO of KPHC, I keep our focus on the patients and communities we serve as our central purpose, and this most definitely is informed by having worked so closely with the people, tribal leadership, governors and Tribal Council. I also serve on the board of a major

hospital, and I advocate at the federal level with CMS, HHS, CDC, and our partners at the IHS to continue to stress the importance of tribal consultation at the state and federal levels and the fulfillment of Federal Trust Responsibilities.

Tell us a bit more about KPHC.

The development of our corporation's strategic plan is our guide by which we attempt to address community-specific health care disparities and positively impact the health of our population we serve. Access to quality care is one of the biggest barriers for our tribal communities, we address this by expanding capital infrastructure, staffing, improving our EMR system, installation of fiberoptic cable connectivity, and having our facility AAAHC accredited in 2021. Our operation budget has changed from 75% federally funded/25% third party revenue to 60% third-party revenue/40% federal funding. We provide outpatient primary care, medical, dental, behavioral health, pharmacy, radiology, public health. We also have specialty services on site—OBGYN, endocrinology, nephrology, audiology, dietary, and others.

KPHC has grown from a struggling corporation to a thriving health care organization in just seven years under your direction. How were you able to accomplish this?

When I got here in 2014, most didn't think we were going to survive as a new tribal organization. Now we're blazing trails. While some tribes have gaming revenue to draw from, we do not, so everything we've accomplished is built off a solid tribal health care business strategy. The support of the community, Tribal Council and our Health Board is essential to our success. We've formed better business partnerships with major hospitals, expanded our services and facilities, and increased our patient volumes year after year. The key to our ability to accomplish this is our focus on sustainability—increasing our third-party revenue, and re-investing it into a 37,000-square-foot expansion, equipment, and hiring more providers or specialty contractors to provide services here locally. We're impacting health care for generations by building a sustainable health care system that will be proactive, not reactive, that will be preventative, and lead to healthier lives.

Tell us about Owl Springs Consulting and how you're helping tribal health care facilities.

I co-founded OSC in 2016 with the vision of "Tribal Sovereignty through Self-Determination" and a mission of building sustainable 638 health care systems that serve the American Indian/Alaskan Native communities. We provide services to support the establishment, sustainability, and expansion of health care services in tribal communities, offering direct consultation, seminars, training, corporate meeting planning, and conference management services. I really love working with 638 facilities because it truly is an exercise of our tribal sovereignty.

CEO & COO

OSC also assists outside health care providers by making connections with tribal facilities, and helping these larger entities understand the uniqueness of tribal health care business. Creating better business partners will build a system that will truly impact the health care services for our Native American communities. I also established the Advancing Tribal Health Care Conference (ATHC) to help 638 facilities grow and thrive in their own communities. We engage national and local speakers, and the event allows tribal facilities to network with outside health care entities and connect with others who can help with any number of issues—provider recruitment, business operations, technology, billing, data, etc. In the end, I want to feel I have made a positive impact in the world and have my children/family proud of the work I have done.

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KAYLYN SCHMER

It's rare that passion and career come together. But when they do, the results can be extraordinary and have an astounding impact on the lives of others. Such is the case with Kaylyn Schmer, the creative mind and noble heart behind Bristle + Bauble.

Kaylyn has always been captivated by the power of design and the idea that well-designed spaces could inspire, empower, and encourage. At an early age, Kaylyn dove into learning about every aspect of the design industry, from architecture to interiors, construction to universal design. She obtained a Bachelor of Science degree from Colorado State University's highly competitive Accredited Interior Design program—and didn't stop there. She is a professional member of the International Interior Design Association (IIDA), a Leadership in Energy and Environmental Design Accredited Professional, with a Building Design and Construction Specialty (LEED AP BD+C), and holds an Interior Design License through the National Council for Interior Design Qualification (NCIDQ).

After a nearly decade-long career with nationally and globally recognized firms, Kaylyn brought her entrepreneurial dreams to fruition in 2018, when she founded Bristle + Bauble. Bristle + Bauble is a flourishing multidisciplinary design firm that fuses interior architecture, graphic design, visual communication, and systemic analysis, all under the research-based design umbrella. Based in Denver, Colorado, Bristle + Bauble serves a host of local and international clients, helping to enliven and streamline their brands by designing every touchpoint of their businesses and homes, and creating physical and digital environments to help clients meet their goals. Always seeking to elicit a response, make an impression, and serve the community, Kaylyn's designs are as impactful as they are beautiful. As the passionate CEO of a growing firm, she is committed to bringing design excellence to all that she does.

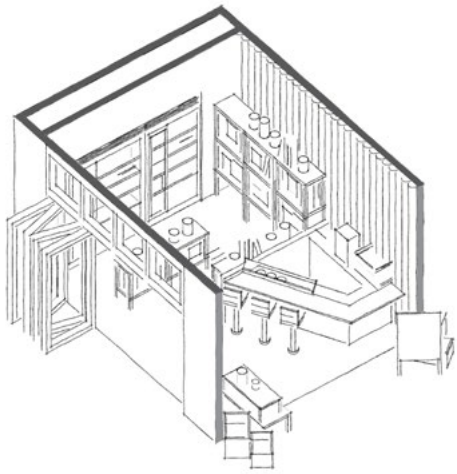
With her reputation as an innovative design leader continuing to spread, Kaylyn has been featured across media, including *VoyageDenver*, *Shoutout Colorado*, and *Our Response:ability*. We had the privilege of sitting down with her to discuss how Bristle + Bauble empowers people and businesses through intentional design.

Let's start at the beginning, Kaylyn. What led to you to start your own firm?

After working for some of the best firms in the business, I realized I needed more. I needed to explore deeper aspects of design, delve into research, and connect with clients whose passion mirrored my own. By going out on my own, I was able to dedicate myself to what mattered most to me. The *power* of design captivates me, and I'm continually learning how I can use design to make significant, positive impacts on people's lives—in their homes and their workplaces. Owning Bristle + Bauble allows me to work on influential projects, reach a broad audience, and hold a more meaningful role in helping people and businesses flourish.

How does Bristle + Bauble differ from other architecture and design firms?

We are passionate about research-based design, and understand that design is most powerful when it can be traced through every aspect of a business or home. We excel at analyzing the big picture, while ensuring the minute details advance the overarching goal. We're nimble



and efficient in our offerings. Our projects and clients receive our full focus and attention, which is rare in an industry where firms simultaneously serve hundreds of clients.

Since design excellence is a prevailing language, we are able to work on a variety of project types and phases—concept exploration, spatial analysis, branding strategy, business development, web development, art direction, photography, and marketing. We manage every phase of the design process, from ideation to execution, which broadens our reach. We offer design services for companies, individuals, brokers, and realtors.

Most people look solely at the aesthetic appeal of a space, but your design approach goes much deeper and begins with "design thinking." Will you explain this for us?

Design thinking is the psychology of how a space or visual experience affects a person, and how this knowledge can be utilized to improve lives. Design goes beyond the face value; there's a reason behind everything you're seeing—and not seeing. From visual connections to the outdoors, to the feeling of safety and ownership in a public space, to the wayfinding experience in a commercial space, everything is placed or designed for a reason and based on the psychology of how users interact with their environment. A user may not be able to articulate the reason behind their sense of serenity in a well-designed space, but most assuredly, a designer meticulously and thoughtfully crafted that experience.

What design services do you offer brokers, realtors, and buyers, and how can they benefit?

Among a host of offerings, Bristle + Bauble provides buyer walk-throughs and spatial analysis. We help residential and commercial clients understand the

possibilities of a new space, and help ensure the space will meet their growth goals. We can also provide 3D models, digital walk-throughs, and marketing images to help demonstrate a space's potential. These cost-effective project visualizations can help move a property from "for sale" to "sold." Finally, we offer design packages for client closing gifts. This allows clients to get the most out of their new space from day one, and serves as a daily reminder of who the client can work with for their next real estate transaction or remodel.

You also help clients virtually design their spaces, correct?

Absolutely! We can work virtually to bring the power of design to anyone, on any budget. We start with a video call, where the owner walks us through the space while we take screenshots, and ask questions to gain a deeper understanding of their needs and project goals. From there, owners measure their space to help keep costs down—don't worry, we guide you through the whole process! Finally, we create the floorplan and move into the design development phase where we bring the project to life. We work directly with our client's general contractor or architecture team to help guide the process, and ensure adherence to design standards, which saves time, money, and produces the best return on their investment.

Speaking of virtual design, tell us about Place + Space and your Staging Snippets series.

In the spring of 2020, during the height of the COVID-19 pandemic, Sean Ewers, a local realtor, and I co-founded Place + Space. We saw a need to help sellers stand out in a highly competitive market, so we decided to bring residential design services to a broader audience—virtually. We created Place + Space to help home sellers net more money on their home sales, without any cost. In our Staging Snippets web series, we present simple, DIY tips for sellers staging their own homes. Through Place + Space, Bristle + Bauble offers virtual services, including existing conditions analysis, staging recommendations, color consults, and project visualizations, all with realtor-exclusive pricing.

Bristle + Bauble's design expertise extends to website development, graphic design, photography, and writing compelling content. How does this all come together to help businesses grow?

We value building people up. To do this, we work closely with our clients to distill a meaningful "why." Why are they doing what they do? Why does it matter, and why do people care? We get to know our clients' businesses, passions, and interests, and make sure every aspect of the design and language supports these. Our attentive and authentic approach enables us to create genuine content people can connect with.

Let's end with a personal question. What do you enjoy most about your work?

What I love most is being able to create something beyond a client's wildest dreams. When we design a solution that's beyond the realm of anything our clients had considered—all in a time- and cost-effective way—there is no greater feeling.

BRISTLE + BAUBLE

We help residential and commercial clients understand the possibilities of a new space, and help ensure the space will meet their growth goals.

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Jon Smith

CEO & President

While most people do well to succeed in one career, Jon Smith has excelled in three. A U.S. Naval Academy graduate, he served 21 years as an active and reserve officer in the Navy. His personal commendations include *Meritorious Service Medal*, four *Navy Commendation Medals*, a *Navy Achievement Medal,* and numerous unit and campaign awards. He is a former chairman of the board for Veterans in Energy, a national nonprofit for veterans and the energy industry. Jon also spent a decade in the automotive sector, holding leadership roles at Ford Motor, Federal Mogul, and then moving to energy with Honeywell SmartEnergy as a vice president. He led growth in businesses in Europe, South America, and Asia during this time.

Jon has never stopped learning throughout his career, earning an MBA and MSIA at Central Michigan University, and a graduate degree from the U.S. Naval War College. He then attended Stanford University Graduate School of Business. Today, Jon holds more than 20 years of executive experience, and he has achieved global success—building exceptional teams, leading organizations in the Americas, Europe, and Asia, and consistently delivering results. He has been published multiple times, most recently by the America Gas Association and featured in *Public Utilities Fortnightly.* He was also a guest on the *CNBC* program, *Advancements with Ted Danson.*

Last year, just prior to the COVID-19 pandemic, Jon joined Hydromax USA (HUSA) as their chief executive officer —a Nebraska-based professional services firm specializing in data collection in support of locating and assessing the condition of the county's aging water, wastewater, and natural gas conveyance systems. Since its founding in 2003, HUSA has used new technologies and innovative techniques to empower contractors, engineers, and utility owners in making the best replacements and rehabilitation decisions regarding their buried infrastructure. Upon becoming CEO and president, Jon quickly responded to the onset of COVID, pivoting the company commercially to reduce risk and to perform an essential service for customers. *The Top 100 Magazine* recently spoke with Jon, who shared more about HUSA, his responsibilities at the company, and how his diverse background experience helped to prepare him for his current role.

You've now been at HUSA for a year and a half. How much growth has the company seen under your direction?

We've experienced very strong growth after a very uncertain time in our country. Shortly after the COVID pandemic hit, we were deemed essential workers, and our teams stepped up to perform outstandingly. We've seen growth in revenue and in customers, which has allowed us to expand our team, offer more opportunities, and meet the increasing demand from our clients across the country. HUSA currently employs just under 500 people across job sites in over 30 states, and we serve over 200 customers—from the smallest municipalities to some of the largest energy companies in the world.

Tell us a bit about your primary responsibilities and your three-legged stool approach.

I'm responsible for leading the strategic growth of the company, keeping us focused on the customer experience, and returning value to our investors. Because I work with employees, customers, and shareholders, I call my approach the three-legged leadership stool. All three areas of leadership must be strong, in balance, and of equal importance, or the stool doesn't work, so my focus has been on providing training and opportunities for growth, building upon the existing talent of our team, and bringing in people with diverse backgrounds who really want to succeed.

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How does your experience in the automotive sector play a role in your work with HUSA and its clients?

The automotive industry gave me a basis in many execution-oriented positions and in cross training, which I would not have gotten anywhere else. The experience also provided me with the opportunity to lead teams or more than 200 people or be a part of just about all functional areas in a business—whether commercial, engineering, or operations. Because of this, I'm equipped with a breadth of leadership background that helps me to relate to what goes into everything they're doing here at HUSA and to recognize what my leaders and teams need to do to fulfill the strategy.

Does your military background also inform your ability to lead and build successful teams?

It absolutely does because the military is all about teamwork. No matter your rank or your function, it's all about the team. The other thing I feel especially fortunate to have learned is how to use the diverse experiences and backgrounds of everyone on the team to accomplish goals and maximize the team results. Today, leaders must have the ability to build a diverse and unique team in order to succeed. This means recognizing both present talent and untapped talent, as we help people expand their boundaries for their own benefits and for the betterment of the entire team—ultimately, leading to the success of our customers and partners.

How do you define leadership?

To me, leadership means more than just pushing the organization or the people. A lot of a leaders are responsible to those around them, helping them see their untapped potential because sometimes people don't know what they can do. It's our responsibility to help them recognize their abilities and to give them a path to grow and achieve things they never thought they could do, even if they think the path is too difficult. They grow, and that is a great thing about being a CEO.... impacting people's lives. In nurturing and helping to build these skills, the strength of the entire team grows. Anytime a leader builds what I call "bench strength"— promoting from within and hiring in at the junior level—this allows management to build a strong organization and expand opportunities from within as the business grows.

What is your global background experience, and how has it been a benefit in your current role?

While in the military, I served in Europe and the Middle East, so I have insight into working with people from different backgrounds, cultures, and worldviews, and I learned to respect their differences. This has not only helped me to communicate with others and to build a diverse staff, but it also allows me to be a better leader for the people who have been entrusted to me, be it our staff or our customers. It has taught me to remove blinders.

Jon joined Hydromax USA (HUSA) as their chief executive officer —a Nebraska-based professional services firm specializing in data collection in support of locating and assessing the condition of the county's aging water, wastewater, and natural gas conveyance systems.

What drives you, and what do you most enjoy about your work?

I draw strength and inspiration from my family, so I want to give a big shout out to my wife of over 20 years. She was an executive at Ford prior to leading our household, but I remain her biggest challenge by far. I'm so very proud of her and our three children. I love being able to balance family and career—and to see both flourish. As far as what I enjoy, no two days are the same, and I love being ready for the challenges and opportunities that every day brings and making others better. It's very rewarding to see high performers on my teams growing and doing fantastic things in their careers and within their communities. I fully recognize that people are putting their livelihoods and futures in my hands, so I approach each day by thinking about the effects my choices will have on them. As a CEO and leader, you can't ever forget it's not about you. It's the team.

KEN MILLER

President & Founder

> My background is unique, with expertise in economics, supply chain, finance, and business expertise, and my experience across all these areas allows me to identify the aspects that are working well for a business and as well as the minute flaws that are hindering its success.

About

Long before his illustrious career in business was so much as a glint in his eye, Ken Miller possessed a drive to succeed and a desire to serve others. When he landed in the U.S. from Jamaica at just 15 years old, he hit the ground running—literally. His exceptional talent for and strong commitment to athletics and academics took him from high school to New York's Syracuse University, where he ran track and graduated with a degree in economics. Rather than follow the footsteps of his classmates into a lucrative career, Ken joined the Army and spent the next eight years in various combat units, including Haiti, Iraq, and Bosnia. After he returned to civilian life, he launched into his professional career, serving for 20 years as vice president of J.B. Hunt Transport's Intermodal, overseeing all aspects of the largest region in the company.

With laser-like focus, he absorbed the intricacies operations, sales, transportation, budgets, intermodal operations, contract negotiations, customer relationships, maintenance, safety, and budget preparation, and along the way, obtained his supply chain certificate from the University of Arkansas. In 2018, Ken took his broad expertise and his commitment to business—and people—and founded Saint Elizabeth Capital, a Chicago-based private equity firm that acquires, manages, and builds small- to middle-market companies. Ken recently met with *The Top 100 Magazine* to share more about his background, his company, and his success in building a thriving business.

Q & A

Ken, after a long, successful career as a senior corporate executive, what led you to start your own private equity firm?

I enjoyed being part of a corporation, but I wanted to be in a position where I could use my expertise to help others succeed as well. I wanted to choose projects that would not only make money, but that I could also love and fix myself. My background is unique, with expertise in economics, supply chain, finance, and business expertise, and my experience across all these areas allows me to identify the aspects that are working well for a business and as well as the minute flaws that are hindering its success. As I was considering my options, I talked to a good friend of mine,

We're very selective in the companies we purchase, but we're always happy to look at them upon request. If they fit our criteria, and if we can help by acquiring them, then we will.

David Panton, who owns Panton Equity. He said, "You understand the finance of it as well as how to fix the business, and that is an invaluable combination." His response convinced me that I needed to do this, and I opened my firm two years later.

Tell us about Saint Elizabeth Capital.

The firm's atmosphere is ambitious and energetic. We believe the best opportunities to create significant value are found in companies that need new capital and new ownership structures. Our goal is to provide attractive exit options for owners and operators of small- to medium-sized privately held enterprises and to offer divestiture opportunities for divisions of corporate parent companies that no longer reflect the company's strategic focus.

Our goal is to provide attractive exit options for owners and operators of small- to medium-sized privately held enterprises and to offer divestiture opportunities for divisions of corporate parent companies that no longer reflect the company's strategic focus.

How do you identify which companies are good acquisition candidates?

We look across the country for companies that provide a needed service, have good foundations, and solid structures, but might be missing some things that could make them more successful and profitable. People reach out to us all the time to ask if we can buy their business, and I've looked at more than 200 of those. We're very selective in the companies we purchase, but we're always happy to look at them upon request. If they fit our criteria, and if we can help by acquiring them, then we will.

Do you always acquire them, or do you also provide capital and partner with the owners?

I will partner with someone, as long as I have controlling interest. There are also times when an owner wants to keep the business in the family but needs a capital infusion or my operational and management expertise to help the company survive or succeed further than it has in the past. In these cases, I'm happy to partner with them to help them reach their goals.

How does Saint Elizabeth Capital differ from other private equity firms?

First, while all equity firms look for companies that are attractive to start or buy, most buy a company in trouble, bring someone in to run it, then sell it for five times more than their investment. We're different. Every company I buy into, I personally run for about six months, and once we've stabilized it and built it up, I hire an operations manager, but I'm always available to help. Most other equity companies have people who are skilled in finance, but few are equipped to actually run a business.

Another difference is that I don't necessarily sell the company. It's more about fixing it and making it a more profitable company that's going to be in our portfolio. I genuinely care about helping the owners, retaining the staff, improving their skills, and increasing their compensation. When employees feel valued, they're happier, and this not only fosters loyalty, but also results in a more efficient company. Many of the family-owned businesses I acquire have been handed down over the course of multiple generations, and their legacies continue in my hands.

The underlying driver throughout your career has been your desire to serve others. Tell us about this.

It most certainly is. My father always says, "Leave the world better than you found it." Those are the words that drive my decisions when I consider acquiring any company. I always ask myself: If I buy this business, can I leave the family, company, employees, and community better than I found them? Will the neighborhood benefit more from a vacant storefront or from the mainstay that they rely on? Although I like the comfort that money has provided, it has never been my motivator; it's the people that I help. In this vein, I also continue to support the track and field program at Syracuse University, to give back to the program that played such a pivotal role in who am today, and I continue to serve on the board of the Illinois Trucking Association and work with the Midwest Homeless Shelter.

SAINT ELIZABETH CAPITAL

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Q & A

RAY IMMELMAN

Ray Immelman has spent his entire 35-year career in the executive management and business advisory fields, leading engagements to build high-performance organizations. Engagements span from the United Nations to some of the biggest companies across the globe—Volkswagen, Pfizer, Kroger, Walmart, BP, and Proctor & Gamble among them. A highly regarded thought leader and expert in the field, Ray's work has been recognized with the *TOCICO Award for Excellence* and *The Weber State University Bob Fox award for Excellence*, and his popular book, *Great Boss – Dead Boss*, has been ranked by Fortune Magazine Councils as one of the 32 best management books ever written. Now, as the CEO of Akzeon, Inc., Ray leads a global management consulting firm that focuses on implementing a radical new approach to maximizing productivity, providing companies with the strategies, methods, and models to drive growth and success. Ray is an IMCMI certified CMC- the pinnacle qualification in the professional management consulting sphere where only 0.15% of the industry achieve this credential. Founded in 2015, the company has built a strong reputation as a respected management consulting firm around the world.

Long before Ray rose to the C-suite and served on the boards of public companies, he started his career as an industrial engineer on the manufacturing shop floor. He's been "in the trenches" at every level of a company. And it is this uniquely broad perspective from hundreds of engagements that allows to him to understand the core of the larger organizational machine, examining the business from the inside out, the outside in, from the top down and the down up, identifying areas of improvement. Ray and a team of like-minded experts bring their clients new perspectives and operating models, innovative work methodologies, and better systems management—all with the goal of helping organizations achieve their core reason for being: creating and delivering increasing prosperity to all its stakeholders. We sat down with Ray to learn more about Akzeon and how they're bringing together people and AI to create what he calls "The Golden Thread," which enables their clients to reach remarkable performance levels.

> We focus on integrating technology and humanity through behavioral science and systems engineering, integrating motivation and systemic change in a single, cohesive model.

Akzeon has experience with helping hundreds of executive teams worldwide. Give us a brief primer on what the company does.

Whether a dairy products company in New Zealand, a carpet mill in Australia, a shared services organization in Arkansas, or a Fortune 100 in New York, all organizations battle with impactful digital and operational transformation. Our core capability is to drive the realignment, integration, and embedment of new business activity systems and processes. We focus on integrating technology and humanity through behavioral science and systems engineering, integrating motivation and systemic change in a single, cohesive model. We have found that if companies reconceptualize how to integrate people with technology, AI, and deep learning, then it delivers productivity and prosperity gains beyond expectations.

> Ray and a team of like-minded experts bring their clients new perspectives and operating models, innovative work methodologies, and better systems management—all with the goal of helping organizations achieve their core reason for being: creating and delivering increasing prosperity to all its stakeholders.

People often think the implementation of AI and technology means replacing humans with machines. However, Akzeon focuses on integrating AI *and* people to help them work more effectively. Will you tell us about this?

Certainly, and you hit the nail on the head—the core of our focus is the integration of technology, particularly AI and deep learning with *people*. Many times, AI is seen with distrust because people find it hard to determine how those algorithms are acting or not acting in their best interest. We find a growing sense among employees of being subordinated to technology. It is the core of our approach to construct business activity systems that balance people, technology, and deep learning. We know from hands-on research that companies waste between 20% to 30% of people's capacity on low-impact work—in meetings to synchronize activities, putting project plans together, and all the low-impact activities that support delivering the *actual* product or service to clients. Simply put, we reconfigure work, systems, and AI to eliminate all this low-impact work so that people can focus on the meaningful high-impact work. They feel more in control, more valued, less frustrated, and they see their work contribute to prosperity.

AKZEON

What I've observed is that the traditional organizational construct of function and process puts the organization in conflict between the functional KPIs and metrics versus process metrics. Digital transformation should answer the question: "How do we best spend our time on the things that bring prosperity to our customers?" We find that prioritizing functional efficiency produces systemic de-synchronization, that's where the productivity loss comes from. To improve systemic productivity, we reconfigure the organization as a set of business activity systems, which means everybody in organization, rather than worrying about their functions and processes, collaborates to make the systems effective. In order to make them systemically effective, we integrate AI, technology, and teams A remarkable side benefit is the reduction in demand on management time.

You've spent your entire executive career "in the trenches." How does this insight benefit your clients?

I've experienced what they've experienced, and I've tested my recommendations in live environments where I carried executive responsibility with positive results for those organizations, so I know they work. I've learned what works and what fails—I've eaten my own dog food, so to say, and that's important because many in the consulting and advisory community tend to stand on the shore and tell you how to row the boat, but what I've done is get in the boat and row. I know what their concerns are, their frustrations, and the goals they're trying to achieve.

As business leaders, we spend 80% of our time coordinating and synchronizing communications, relationships, activities, staff oversight, crisis management, etc. These are all low-impact work demands stemming from the function/process paradigm. Instead, we should be spending our time on the most important aspects of running our businesses—working with our clients, innovating new services, products, processes, marketing campaigns, improving customer service, etc.—the things that bring our companies, employees, and customers the greatest prosperity.

Tell us what you mean by "The Golden Thread."

When people have confidence in each other's skills, have aligned priorities and reliable systems, they trust each other to function as cohesive teams collectively responsible for systemic productivity. In that environment, employees feel valued and committed when working together, and the clients can sense that. For this to happen, you must integrate AI, technology, people, and systems, all working almost intuitively together. It just works, and people can't wait to get to work in the morning. It's similar to a baseball team. You can have nine of the best players in the sport on field and they just cannot win a game because they're focused solely on their own statistics or distracted by the mechanics. But if those nine players rid themselves of this individual, nonessential minutia, and trust each other and their own abilities as part the whole, this profound alignment forms between them—this "Golden Thread," I call it. The fans can feel it, the players can feel it—and they'll win the World Series.

Let's end with a somewhat personal question, Ray. What do you enjoy most about your work?

I enjoy the challenge. Every organization we go into, it is a challenge to bring about significant improvement, and just to see organizations become more satisfying places to work in, to see better alignment between management and teams, to see significant improvement in customer satisfaction and greater prosperity flow to all stakeholders is better than any drug you can take because the high from seeing that happen is enormous. Still, after all these years, when I see this after we've worked with one of our clients, I think, "Wow, we did this?" In many instances, we arrive as coaches and advisors, but leave as mutually appreciated friends.

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Meet *The Economic Mind Bridging Portfolio and Wealth Management in a Compelling New Way*

RICARDO CORTEZ

To the average person, philosophy is no more than a set of ideals or beliefs used to describe behavior and thought and not many would make the connection between it and matters of the economy. But as a learned student of the booms and busts, Ricardo (Rick) Cortez, has not only understood the relevance between these areas, but successfully employed them in unison throughout a distinctive 40-year career.

Rick's foothold within the fields of economy, academia, and the full spectrum of investing has left an indelible mark on the students, colleagues, and clients, who have had the good fortune of working alongside him, but the magnitude of his impact can be accurately described as societal.

To abridge such an illustrious career for the sake of an editorial is not only an arduous task, but one that brings forth the challenge of "what could possibly be excluded from this incredible story?" We wanted to know and share more than what would appear on Rick's résumé. In pursuit of this endeavor, we spoke with Rick to learn more about his motivation, his passions, and his incredible journey.

Rick, let's set the stage with the philosophy that has guided your entire career. Why is it so important for both advisors and investors to understand the connection between economics and investments?

Economics fuel everything. It explains most of the major social and political events in our country, so it's important to recognize its relation to financial health. The fact is, in order to really understand money—economies, finance, the stock market, etc.—you have to study psychology, sociology, and historical trends. Really, the study of economics and the market is the study of philosophy.

Will you give us a brief synopsis of your current role?

I accepted my initial appointment with Broadmark Asset Management LLC, as president of global distribution in 2009 and then, in 2013, I became co-CEO. I am now the chief risk officer and a member of the investment team, leading global sales and marketing efforts and sharing in the oversight of the firm's business operations.

And can you give us an overall view of Broadmark Asset Management?

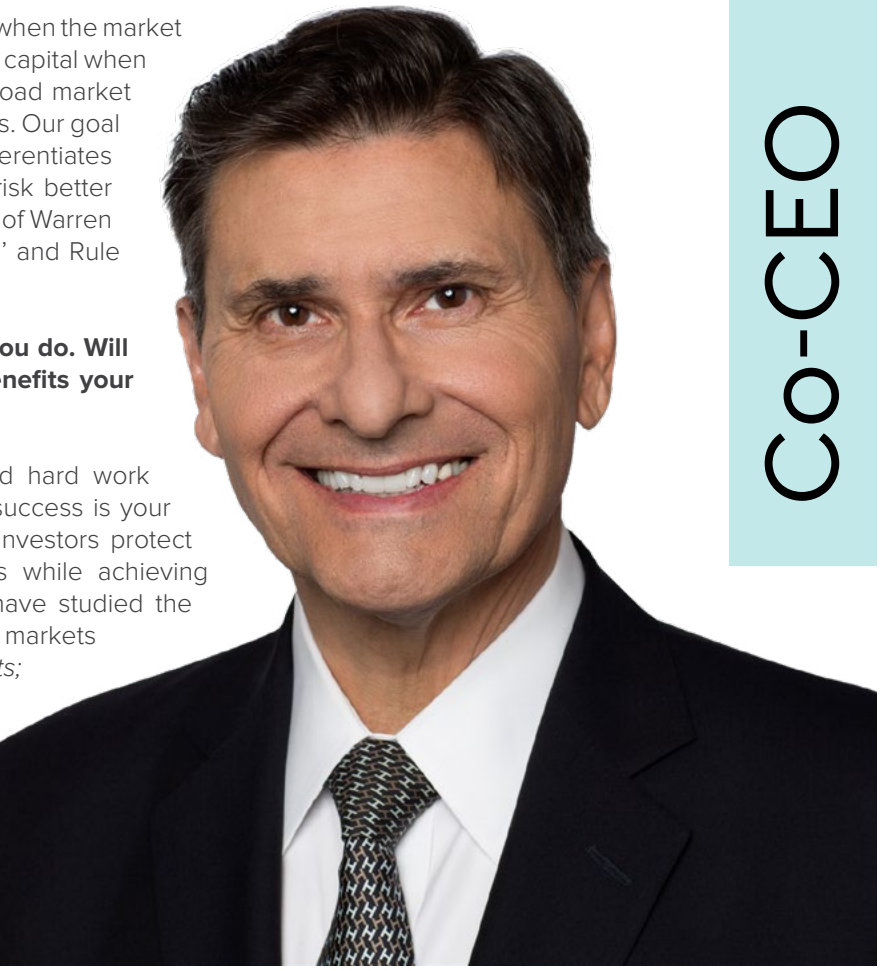
Yes. First and foremost, we are a portfolio management firm, not a wealth management firm, and although we may often perform in the space between the two, we are ultimately focused on risk management in equity markets. Our strategy differs from most in this arena because it is both discretionary and directional, as opposed to traditional hedged equity. The process was designed to counter conventional buy-and-hold investing and allows for a flexible investment mandate within all market environments.

BROADMARK
ASSET MANAGEMENT LLC

For those of us who aren't knowledgeable of the nuances you mention, can you elaborate a bit on the advantages of the Broadmark strategy?

Most investment managers try to find companies that are reasonably valued and purchase those stocks for capital appreciation. We don't do that. We want to see positive returns every year and in order

Co-CEO



to do that, we need to have a way of participating when the market goes up, and more importantly, attempt to protect capital when the market goes down. We invest only in the broad market indexes. We do not invest in individual companies. Our goal is to manage the downside risk. That's what differentiates us from others—we have historically mitigated risk better so that there has been little decline. In the words of Warren Buffet, "Rule Number One is 'Don't lose money;' and Rule Number Two is 'Don't forget Rule Number One.'"

Obviously, you have a purpose behind what you do. Will you share what motivates you and how it benefits your clients?

Steve Jobs said that passion, persistence, and hard work are important, but the most important factor in success is your purpose. I believe that my purpose is to help investors protect their capital during adverse market conditions while achieving a reasonable long-term return. To that end, I have studied the historical cycles of the economic and financial markets extensively, particularly the *booms and busts;* times when the market really got hurt, like the Depression and the Financial Crisis of 2008. During these times, even the strongest companies crumbled, so my examination was not only predicated on how to navigate volatile markets, but how to manage and adapt to crises through market analysis. This requires a knowledge of history, economics, psychology, politics, social studies, statistics, probability/game theory, and mathematics, as well as a profound knowledge of traditional finance, but it is absolutely essential as the stock market becomes increasingly risky as a result of disruptions from the COVID-19 pandemic, the enormous debt levels in the U.S. and globally, and intense speculation and overvaluation of financial assets.

I believe that my purpose is to help investors protect their capital during adverse market conditions while achieving a reasonable long-term return.

You share your immense knowledge with clients, but you are also very engaged in academia. Can you tell us about your roles as an educator?

I am a lifelong student, so I believe in the power of education and the progress it facilitates. I'm an adjunct faculty member at Harvard University, and, as a Queens College alumnus, I serve on their business advisory board. I have also been a guest lecturer on *Investment Policy and Hedge Funds* at the Wharton School, University of Pennsylvania, and I mentor executives in the *Leadership Pathway Program* for the Money Management Institute (MMI).

I know you have many passions but what in particular do you enjoy most about your career?

I think what I enjoy most is interacting with people, learning from them, and discussing finance and how the proper management of money can lead to a better life. I also appreciate my travels and learning about other cultures and their economic influences.

My career gratification can also be credited in part to my partner and the firm's founder, Chris Guptill. He created the systematic strategy that we use, which allows us to serve our clients so well. This not only promotes personal satisfaction but is reflected in the $1.3 billion that we manage today.

In 2020, Rick was awarded the President's Medal, the school's highest administrative honor, by his alma mater, Queens College, and received the Lifetime Achievement Award from Marquis' Who's Who in 2021. He holds a Certified Investment Management Analyst® designation from The Wharton School.

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Photo by Jenn

BRIAN ABRAMS

President & Founder

Renowned for his innovation and highly motivated drive, Brian Abrams has single-handedly changed the landscape of project management staffing. Over the course of his 20-year career, the project management recruitment expert has worked for a number of respectable firms, been featured in *Forbes Magazine,* and placed hundreds of project management professionals in permanent positions and contract engagements. However, his greatest accomplishment came in 2014 when he took his years of insight and experience to start his own company. Based in Massachusetts, PMO Partners is the first of its kind—focusing specifically on professional IT project management recruitment and consulting services. Led by industry experts, the firm's dedicated team of seasoned professionals help clients meet their goals by connecting them to elite IT project management and business analysis talent. We recently had the opportunity to speak with Brian to learn more about PMO Partners and how they're leading the charge to fill the long unmet need in a complex and ever-evolving specialty.

What inspired you to start a firm that specializes in IT project management?

When I worked within the primary staffing world, I was responsible for recruiting project managers, and I really liked it. I knew companies were struggling to find professional project managers, and particularly those who were also IT experts, through their HR departments or other staffing firms. There were countless recruitment firms focusing on myriad positions, yet it seemed none of them were addressing this growing unmet need. I had specialized experience in this area, and I'd built a large network of project managers throughout my career, so I branched out on my own with a specialty company focused solely on this specific niche to help those customers.

> "I enjoy creating perfect matches between candidates and clients. There's nothing better than hearing that candidates I've placed are extremely happy in their new positions and enhancing their teams and companies."

PMO Partners works specifically with elite or specialized companies. Could you expand on that for us?

Of course. Our goal has always been to work with clients who are considered elite because we are a top-notch staffing firm. We have no desire to be the largest firm. We want to be the best of the best serving the best of the best companies out there. We work with specialized or elite companies in their respective field—Ivy League schools, well-known nonprofits, industry big-leaguers, and corporate or retail household names. We set equally high standards for our candidates as well, and we have a healthy pool of talent, from entry level to the C-suite, spanning multiple industries throughout the country.

What are the most critical skills for an IT project manager to possess, and how do they differ from a general project manager?

Project managers exist in every industry, but as project managers for IT, it's a whole different world, and that's my focus. Within IT itself there's probably 40 to 50 different project managers. You can't just hire a PM; it's much more granular than that. An IT PM needs to be able to communicate clearly with all different levels and with all different cultures. They need to be a driver who can assess a situation and drive it to its finish, and they need to be very organized. Also, since the onset of COVID

and remote working, the ability to use video platforms has become extremely important. Mastering the video platforms, understanding the etiquette, and effectively communicating with multiple people on them has become a talent and a new critical skill in and of itself.

What are the most common needs of your clients?

Mostly, our clients look for project managers that know how to drive projects, work with the key stakeholders and vendor partners, remove obstacles and keep projects moving to completion. From a technology standpoint, those who hold expertise in Workday and Salesforce are in high demand nowadays. With those two systems taking over the market, this has become a critical skill for project managers to have.

We work with our clients to help them really understand what it is that they're looking for, and then we find the specific candidate with the specific skills and personality that best fit their needs. Sometimes they know what they need, but other times, they know need a project manager, but don't understand exactly *what* they need, and we can help them define it and provide the person that best fits.

How has the shift to a remote workforce during the pandemic changed the way companies are approaching their staffing needs?

When COVID hit and companies began hiring outside of their own cities, it actually made it easier for them to hire the right skill set. Having people work remotely has opened the talent pool to regional and nationwide candidates, and clients are now comfortable hiring someone who isn't local. I already had years of experience in helping clients navigate challenging periods, and we had made a similar shift during the dot.com crash and the 2008 financial crisis, so we were able to adapt quickly to the changing needs of our clients and candidates during the pandemic. Companies are seeing the benefits of a larger talent pool, so I foresee the trend of remote workforces continuing well beyond the pandemic, if not permanently, especially beyond IT.

How important is cultural fit to the success of the clients and candidates you bring together, and how do you ensure it?

Cultural fit is extremely important, especially when it comes to the skill sets that I place. Before we even talk to the client about the job, we learn about the culture, environment, personalities, communication style, work style, and shared values. These elements can really make someone a perfect fit for an organization, so I consider all of them while interviewing candidates.

What aspect of your job do you enjoy most?

I enjoy creating perfect matches between candidates and clients. There's nothing better than hearing that candidates I've placed are extremely happy in their new positions and enhancing their teams and companies. Some of our candidates have been with our clients for years—as permanent placements or as consultants.

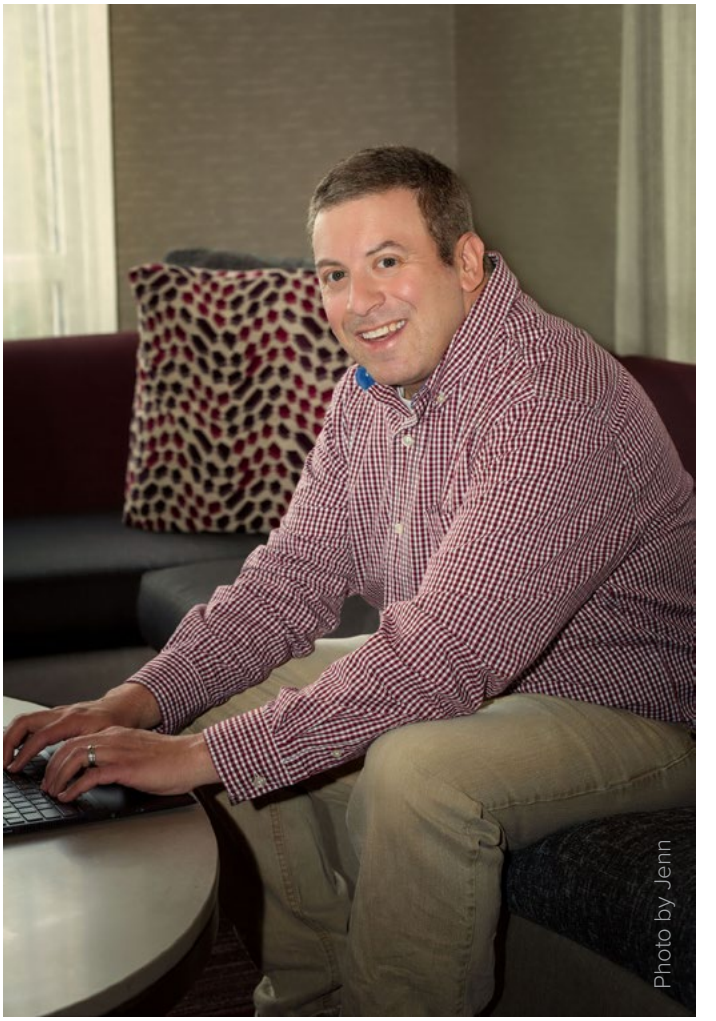
Photo by Jenn

To what do you attribute the success of PMO Partners?

The primary driver is our niche skill set. We're a unique staffing firm doing something that other companies really aren't focusing on, and the IT project management skill set is becoming more and more important. We hear from clients often that they love that we're experts in this very specialized area, and we strive to develop strong relationships with them and with our candidates. Our relationship-based approach also separates us from other firms that are more transactional. I call them "fast-food" firms because they're all about quantity instead of quality. I think our clients would agree that quality is definitely a central focus for us and knowing that they feel this in every interaction with us tells me we're doing it right.

PMO Partners llc

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JONATHAN GRAMMER

Q&A From the boardroom to the courtroom to the field, Jonathan Grammer leads a one-of-a-kind energy services firm that not only specializes in land acquisition and development, but also employs a legal team with specific expertise in the energy sector. As a trial attorney with more than two decades of experience in the energy industry, Jonathan has litigated matters involving complex energy, corporate cases, commercial contracts, and business disputes. In 2006, he brought his wealth of expertise to found Grammer Land & Exploration Corporation (GL&E) in Amarillo, Texas, a full-service company that handles acquisitions and development projects, legal and consulting services for independent operators in the oil and gas, solar, and alternative energy industries. Over the past 15 years, Jonathan and his team have worked on hundreds of energy projects across the Southwest valued at well over $1 billion, spanning the universe of oil and gas and renewables such as solar, electrical, wind, and pipelines, among others—while consulting on matters involving the Texas Railroad Commission, Oklahoma Corporation Commission, the Texas Legislature, and the Public Utility Commission.

As a rare, all-in-one attorney, landman, oil and gas developer, and renewable energy developer, Jonathan has been featured in *Oilman Magazine, Austin Monthly, The Pipeline, The Houston Business Journal*, and *Solar Power World Magazine*. He also serves as a contributing author to *Texas CEO Magazine* and AAPL's *The Landman.* We recently had the pleasure of speaking with Jonathan to learn more about his company and his insight as a thought leader in the field.

How does GL&E differ from other companies in this space?

We're the only firm like ours that exists. We are not only a land acquisition and development company, but we have a legal team that specializes in energy as well. It comes down to everybody wants to either be an advocate for the oil and gas industry or an advocate for clean energy and renewables, and in a great deal of projects, they're being developed on the same land, and the companies don't know how to communicate with each other. At the same time, the development and legal teams of those respective companies are each focused on either one form of energy or another, so they oftentimes have tunnel vision because they do not have the insight or experience across both renewable and oil and gas to see how these companies can coexist successfully on the same parcel of land. We're trying to help energy companies realize that we're all interconnected right now, and by focusing on this, I think we can change the industry as whole. That's what this company is all about.

With this in mind, we've completed projects for national oil and gas companies, renewable energy developers, independent regional operators, and many other private interest groups. Our policy is to provide the most accurate and detailed analysis of

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natural resources possible along with the most affordable rates for their acquisitions. Our legal team is also second to none, with expertise specific to the energy field and a wide geographic reach with licensing to practice law in Texas, Oklahoma, New Mexico, and Colorado. In addition, my personal licensing is before the U.S. Supreme Court, Oklahoma Supreme Court, U.S. District Courts for Northern District of Texas, Colorado, Nebraska, Western District of Oklahoma, Eastern District of Arkansas, Western District of Arkansas, and the U.S. Court of Appeals for the 5th, 6th, 8th, 9th, and 10th circuits.

With the increasing proliferation of renewables across Texas and Oklahoma, are more clients seeking your counsel about potential conflicts between renewable energy development and traditional oil and gas projects?

Absolutely. As more renewables, specifically solar, begin to move into Texas and Oklahoma, we are proud to be one of the few companies with a strong knowledge base of traditional oil and gas and how those interests and rights conflict with solar development. It really helps our clients develop their respective energy industries in, and around, each other.

Tell us about your carbon-sequestration projects.

In addition to Grammer Land & Exploration, I manage a newly-formed company called U.S. Carbon Capture Solutions. We have combined our experience and knowledge and our resources in oil and gas and renewable energy to help the environment by reducing carbon emissions. We're not going to be able to pull all this carbon out of the air, but we can return the CO2 to ground via carbon-capture sequestration. We have assembled a team of some of the most experienced personnel in the country that have dealt with CO2 capture for decades. This has 100% of my attention right, and it should have everyone else's attention, too. Right now, we're actively involved in carbon-capture sequestration projects for one coal-fired power plant, one natural gas power plant, and several other facilities, including factories, fertilizer remanufacturers, and cement remanufacturers across the Southwestern U.S. It is the ultimate bipartisan energy agenda for the United States: finding a way for both electrical generation facilities powered by coal as well as renewable energy sources to thrive for a secure environment is dependent upon good carbon capture management.

> Jonathan has litigated matters involving complex energy, corporate cases, commercial contracts, and business disputes.

How has your work with clients changed as a result of COVID?

As the pandemic thrust the country into the "new normal" of remote interaction, it's expanded our reach and has allowed us to meet clients and handle projects in other areas. We didn't panic and tried hard to keep going when everyone else was hiding. I think this is a testament to how we do things. Indeed, like the rest of the world, we were limited to video calls, but we never stopped or limited our work with our current clients or with new clients in new regions, to help them continue their operations uninterrupted.

One final question that I'm sure many are curious about. What do you enjoy most about your work?

When I was a full-time attorney, my mind was constantly reaching for the complex that others struggled to understand. Your destiny is determined by something pulling you, not driving you, and I'm a firm believer in that. There's something about the business, and the many moving parts, and the challenge of putting those all together to execute a project successfully, regardless of its complexity. That's what really draws me to what I do, and that's what drives me every day.

TONYA WINDERS

It is by no means a stretch of the imagination to envision Tonya Winders listed among the likes of Marie Curie, Florence Nightingale, and Virginia Apgar. These pioneers of healthcare, these unconstrained advocates, these ushers of progress, have all championed a common cause; to protect those who are vulnerable. And in pursuit of this lofty goal, each has made a measurable advance in medicine and held above all else, the needs of patients.

From protecting classmates in the schoolyard to battling a rare form of cancer, Tonya was born a defender. Over the past two decades, she has devoted herself entirely to patient empowerment, working tirelessly to ensure access to quality care. Whether she is advocating for effective diagnostic and treatment tools, addressing medical professionals at international symposiums, or penning one of her 50 peer-reviewed articles, Tonya ensures that the patient's voice is heard.

As CEO of Allergy & Asthma Network and, equally significant, the mother of five children, four of whom suffer from chronic disorders, Tonya is firmly entrenched in the allergy, asthma, respiratory, and immunology sectors and wholly dedicated to eradicating deaths and improving outcomes for patients with these illnesses.

We spoke with Tonya at great length and what we learned could fill a hundred captivating pages. Excluding even a single word of her journey, and the achievements therein, is to our dismay but we endeavored to present a substantive digest that at minimum, is reflective of her phenomenal story.

Tonya, you are engaged in quite a few organizations. Would you take us through them?

Yes. I am president and CEO of Allergy & Asthma Network, as well as president of Global Allergy & Airways Patient Platform. For each of these organizations, I execute the vision, mission, and values dictated by their boards of directors. In this charge, I am responsible for sustaining their respective strategic visions, membership development, program direction, patient advocacy, and education initiatives. I also serve as project manager for several of Allergy & Asthma Network's programs including Not One More Life, which partners with faith-based cooperatives to reduce respiratory disease among African Americans, and The Trusted Messengers, which provides COVID testing/vaccinations, general health/respiratory and COVID screening, and health coaching to underserved communities.

That's a lot of responsibility. What would you say is your motivation? What drives you to continue your efforts?

It's the mission. Every day, I think about getting to that point of zero death, then try to move the needle forward inch by inch. By bringing awareness and education, and changing public

policy, I want to improve the lives of the 800 million people living with asthma, allergies, COPD, and other respiratory illnesses. I also place tremendous value on the privilege of getting to know patients, their perspectives and stories, and then supporting them. I still take phone calls from our help line and engage to help them find solutions to their personal impediments.

Tonya is firmly entrenched in the allergy, asthma, respiratory, and immunology sectors and wholly dedicated to eradicating deaths and improving outcomes for patients with these illnesses.

What is the biggest barrier to care and medication, and how are you working to fix these issues?

The barriers are rooted in access to care. What we know is that lower socioeconomic and education levels often dictate the quality of care one receives. Through programs like Not One More Life, we provide resources—not just treatment or medication, but legal and housing help. We also host an annual *Allergy Asthma Day* where over 300 people meet with Congress to discuss the issues, policies, and barriers that families with allergies and asthma face. Through this effort, we've had critical federal and state laws passed. We're currently working on *The Safe Step Act,* a bill that would limit an insurance company's mandated prerequisite treatments and allow patients to obtain the best treatment from the outset.

Asthma alone costs our nation over $80 billion a year in direct/indirect costs. As of 1993, 6,000 people died each year from asthma.. That number is now down to 3,000. We are making headway through better treatments and phenotyping. The science has evolved greatly, and we now have biologics and more advanced treatments to address underlying immune issues and other comorbid conditions.

Your children suffer from respiratory conditions and you, yourself, have been a patient. How do your personal experiences affect your objective?

I think because I identify with the heart of the patient. So many times, guidelines focus solely on the doctors. There's more to patient care than just addressing the symptoms or cause. You have to consider the whole person, all the puzzle pieces—physical, psychological, financial, relational—all these factors impact health and outcomes. I never lose sight of what matters most to the patient. We have medical journals with all the science, but they don't elucidate on the intimate observations of the individual. In the last five years, I have authored and co-authored over 50 papers in an effort to convey that perspective and now, for the first time, medical literature in the space of allergy, asthma, and COPD, is fully embracing patient views. Also, through the organizations I work with, we're training doctors to respect patients more and to ask the right questions and helping patients to be more informed and proactive.

Tonya, no one likes to brag about their awards, but yours are so inspiring. Would you please share the ones that meant most to you?

My work is so fulfilling to me. The formal acknowledgment isn't why I do what I do, but at the same time, it is nice to have my contributions recognized. It confirms that I'm making a difference and that has always

been my goal. In 2021, I was awarded *CEO of the Year*. In that same year, Global Insights *Healthcare Nonprofit of the Year* was awarded to Allergy & Asthma Network. I also received the *Distinguished Service Award* from the American College of Asthma, Allergy, and Immunology, a distinction that usually goes to a doctor, and for the first time, in 2018, it was award to a patient; me.

Prior to leading nonprofit organizations, Tonya spent 15 years in the pharmaceutical and medical device industries. She holds a Master of Business Administration degree and is currently pursuing a second master's degree in global public health.

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JORDAN LAMS

FOUNDER & CEO

Jordan Lams is more than a pioneer of the cannabis industry—he is living proof that tragedy can be turned into triumph. After losing his sister to childhood leukemia, he developed PTSD, and spent years struggling with appetite loss and sleeplessness. Refusing to give up, Jordan set out on a mission to find effective healing methods for himself and for others. In 2007, he began researching the clinical studies and anecdotal evidence of marijuana efficacy when a friend recommended it for medicinal use. Upon receiving his doctor's approval, Jordan began using the product to stimulate sleep and appetite, but he experienced an even greater result—a more sustainable state of well- being. He immediately devoted himself to raising awareness of marijuana's medicinal benefits and to discovering more ways he could use the plant to help people. Once Jordan invested in the product, he learned more about the industry and ultimately became the first person to receive a cannabis business license from the state of California. He founded MOXIE—a Long Beach-based manufacturing, cultivation, and distribution company that has dispensed products throughout CA, MI, NV, AZ, and PA. As a recognized leader and brand name in cannabis concentrates, MOXIE has won more than 100 global cannabis awards and holds strong brand awareness in every legal market. The *Top 100 Magazine* recently met with Jordan to learn more about his journey in the cannabis industry and how MOXIE has evolved as a company.

Q: You joined the cannabis industry at a time when little was known about the plant's medicinal properties. What challenges did you face early on?

When I started over 14 years ago, I quickly discovered a lack of supply chain, counseling services, and palliative patient care for consumers at the point of purchase. Although several universities had conducted studies of the product's benefits, it was still largely up to patient-communities to share information amongst themselves. People also had to trust what dispensaries had available, which affected access to consistent medicine. So, I ended up cultivating with another patient and friend and began working as a volunteer for an education-centric non-profit to learn more about how I could help address some of these issues within the industry.

Q: How did you make the jump from cultivation to launching your own company?

A: I eventually began to receive opportunities from dispensaries and leveraged my knowledge of the plant into patient care and counseling. At first, I worked at dispensary counters in Los Angeles, and then worked my way up the ranks to managing, and, ultimately, to principal. Then, over the years, I started to get more involved in the manufacturing of complex products that required extraction, formulation, etc. I eventually stepped away from the retail side and devoted all of my energy to manufacturing, which led to the inception of MOXIE.

Q: What sets MOXIE apart from other companies in the industry?

A: Moxie is unique because we pair the "know how" with the infrastructure—which comes together with the brand. We are also relentlessly passionate about cannabis and strive to set the bar for the industry. For example, we've never been willing to compromise on what is acceptable, and we've always vowed to be 100% transparent because it's not worth bending the rules for monetary gain. We have never wavered on our commitment to create safe, high quality cannabis and our legacy in the market speaks to our efforts. Ultimately, our goal is to help people unlock their greatest potential, whether that be within their careers, personal health and wellness, or their communities.

Q: How has MOXIE evolved since its inception seven years ago?

A: Getting to where we are today required a lot of interacting in complex environments, government work, licensing, and more. We started in the medical world in a single-state working with cooperatives of patients who cultivated and manufactured products for each other. I provided the intellectual property and equipment. Today, we are a manufacturing company at our core as we produce

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a vast assortment of high-quality products for both recreational and medicinal markets. We also operate in a number of states, and every operation is very different. Our products are sold under the brand name MOXIE, but our business is one-part manufacturing and one-part lifestyle. The word MOXIE means "force of nature." This is how we see ourselves—as something that was once viewed as detrimental and was stigmatized, but through sheer acts of will and zealous commitment is now available to add immense value to people's quality of life.

> "We are relentlessly passionate about cannabis and strive to set the bar for the industry."

Q: As CEO, how have you helped to ensure that MOXIE's culture will continue to evolve along with the business?

A: One thing that has resonated with me is how essential it is to have a core ideology that outweighs monetary success. It's also important to maintain alignment throughout the entire organization. I've learned that industry leaders have to be working toward something bigger than the economic element. Otherwise, the organization becomes an economic entity rather that a visionary one. When this happens, people pull in different directions, and a company can fall apart. However, when a company has everything in sync, it functions much more efficiently. There's a lot of very compelling data to support this need to adhere to a core value set bigger than monetary gain. The laws are complex, every state is different when it comes to cannabis legislation, and we operate in a very politically polarizing space that impacts real people's lives on a daily basis. Therefore, alignment of the value set throughout is critical.

Q: Are you involved in any charitable works outside of MOXIE?

A: The inspiration behind my joining the cannabis industry was to find ways of helping people, so giving back to the community has always been important to me. Several years ago, I volunteered for a nonprofit called Marijuana Saves Lives, which assisted consumers in finding education about cannabis therapies that could help them get relief. We had an online resource center and we hosted events to educate people, and it ultimately evolved into larger, separate, organizations instead of remaining a single entity. Today, I focus on social justice. I am a founding director of the National Hispanic Cannabis Council, and I sit on the economic development committee. Our mission is to provide a variety of mentorship opportunities within Hispanic communities. Since English is a second language for many of our staff members at MOXIE, the NHCC focuses a lot on creating resources in their native languages.

LINDA HABGOOD

Q&A

Our expertise enables us to unlock impactful official capital for the benefit of companies committed to growing the world's frontier economies.

A powerhouse in the credit and finance industry, Linda Habgood has worked on transactions in more than 70 countries and arranged billions of dollars in long-term, limited recourse debt and equity for her clients. Driving it all is her expertise in underwriting and structuring transactions to meet investor and lender requirements, and arranging growth capital from commercial, bilateral, and multilateral development banks and the world's export credit agencies. Throughout her 30+ year career, Linda has held positions as a banker, advisor, and principal, and today serves as co-chair of Delphos International ("Delphos"), a role she was well-prepared for, following her tenure at the Overseas Private Investment Corporation (now the U.S. Development Finance Corporation) and The Chase Manhattan Bank. Delphos is a premier independent financial advisory firm specializing in securing long-term, competitively priced capital for businesses and projects across emerging markets. With a global reach that stretches across Africa, Asia, Latin America, the Middle East, and Eastern Europe, Delphos counts among its clients the World Bank, USTDA, the Inter-American Development Bank, MCC, USAID, African Development Bank, leading infrastructure developers and strategic investors, emerging markets private equity firms, and foreign governments and utilities.

As a recognized expert in emerging markets finance and the leader of a firm dedicated to impact investing, Linda helped build Delphos to $20 billion in capital raised, a client base of over 1,200, and a respected global expert. Driven by her commitment to her clients and her passion for making a meaningful impact on investors and communities alike, she's led change and innovation in the firm's financial solutions, helping Delphos to win eight industry awards—including two prestigious Project Finance International Deal of the Year commendations.

As the first female partner of Delphos and the first woman to serve on its board, Linda has a passion for advancing women and gender equity in the field of finance. She is the co-founder and a legacy member of Wharton EMBA Women's Affinity Group, providing networking and mentoring support to an extensive group of women entering the business and financial sectors from one of the top business schools. Linda received an MBA with a finance and entrepreneurship concentration from the Wharton School of the University of Pennsylvania and a BA in international political economy from The College of William and Mary. She also holds FINRA series 7 and 63 licenses.

The Top 100 Magazine spoke with Linda to learn more about how she and Delphos are helping investors, businesses, and communities across the globe benefit from impact investing.

Tell us more about Delphos and the services you provide.

Delphos is a 34-year-old, independent, emerging markets financial advisory firm with eight offices across five continents. The development bank funding process can be complex and difficult to navigate – it's not easy to sort out the myriad types and sources of capital. We lead our clients through the transaction process from start to close, saving them time and reducing their costs. We specialize in tapping into the resources of more than 450 government agencies and multilateral organizations worldwide to help clients realize their business goals and enable funders to achieve development objectives. In addition to our capital-raising efforts, we provide consulting services to both government agencies and private-sector clients across multiple industries—including infrastructure, power, telecoms, agriculture, real estate, financial services, and more.

What does your day-to-day look like as co-chair?

My primary responsibilities revolve around enhancing our reputation as the expert in structuring and securing financing from official capital sources and advancing our clients' frontier markets businesses. I focus on structuring transactions that meet the goals of both the public and private sector. It's finding the common ground in a public-private partnership that is the key to a successful transaction.

What sets Delphos apart from other financial firms?

Honestly, we are the original impact advisor. We have been securing development agency capital to facilitate foreign direct investment for decades—long before it was even called "impact" financing. This leadership and experience sets Delphos apart as the go-to source for specialized finance solutions in emerging markets. No one knows the world of development finance like we do. Our expertise enables us to unlock impactful official capital for the benefit of companies committed to growing the world's frontier economies. A lot of companies and project

I love helping companies find just the right public financial solution for their private sector business, but what I enjoy most is closing deals!

developers don't consider the capital provided by these official sources - the development banks - because they think they'll be too bureaucratic or will take too long. However, we know the process inside and out and can help our clients avoid a lot of common and costly mistakes.

Are you seeing increasing interest from investors and companies who are investing in emerging markets?

Absolutely! We're seeing an increasing amount of capital focused on climate change, renewable energy, social advancement, poverty reduction, women's empowerment, and more, and it is really exciting. When Delphos started in 1987, the impact investors were limited to the development banks, but about 10 years ago, the industry created an asset class around global impact investing. Since that time, there's been a deluge of interest from both individual investors and companies worldwide, and COVID has helped to accelerate that trend even further. Foreign direct investment flows generally dropped by 42% in 2020, but there has been much less fluctuation over time in developing economies, which is where Delphos focuses. Every year, $616 billion is flowing into these economies fairly consistently, but the needs are so much greater. Gaps in investment in small- and medium-sized businesses alone were estimated to be $5 trillion before the pandemic hit. These are staggering numbers. Government agencies have always cared about the social and environmental impacts of investments, but what we are happy to see is an increasing volume of private capital following it. As we get better at measuring the impacts of these public and private investments, the asset class will attract even more capital.

What do you enjoy most about your work?

I'm very passionate about the work my colleagues and I do to forge successful public-private partnerships. I love helping companies find just the right public financial solution for their private sector business, but what I enjoy most is closing deals! It's not easy to navigate the world of development finance, and it is thrilling to help my clients identify and secure capital that fits. Unlocking capital that advances a business in an emerging market means more jobs, more technology transfer, more tools to advance an economy and the world's social development goals.

delphos

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Now, by bringing together the most innovative minds in his team and infusing a thorough understanding of the changing market, Arja is leveraging key trends along the energy transition.

Arja Talakar

Arja Talakar is leading the global product business of Siemens Energy Industrial Applications, based in Houston, which provides the most cutting-edge technologies to global energy, oil and gas, infrastructure and industrial customers. With nearly a billion people still lacking access to electricity and the urgency for climate action becoming more amplified, Arja and his global leadership team are continuously advancing capabilities and positioning a world-class portfolio that addresses market priorities such as decarbonization as well as the growing demand for green fuels, such as hydrogen. He is an industry veteran with profound knowledge of the changing skills requirements of the industry—and a deep commitment to businesses that benefit society. Now, by bringing together the most innovative minds in his team and infusing a thorough understanding of the changing market, Arja is leveraging key trends along the energy transition.

"The integration of highly efficient gas turbines with electrically driven trains has been providing combined heat and power solutions in a way that reduces the carbon emissions of applications by over thirty percent," Arja says. With such innovations, the company's product business has been positioning for the very attractive growth opportunities in the hydrogen value chain. Today, the business provides solutions for all hydrogen feed options, whether grey (hydrogen produced from natural gas), blue (hydrogen produced from natural gas with carbon capture and storage) or green (hydrogen produced from renewables). In addition, its capabilities include transportation and compression technologies for hydrogen pipelines and storage, as well as efficient gas turbines that operate on up to 100% hydrogen.

Previously, Arja was leading Siemens Saudi Arabia, a joint venture between Siemens and the E.A. Juffali and Brothers group, and among the largest technology and engineering companies in the Middle East. Arja and his team succeeded in securing and executing some of the world's largest infrastructure projects in the fields of oil and gas, petrochemicals, power generation and transmission, metro and railway projects, health care and digitalization. Furthermore, his deep insight as a thought leader and trusted adviser to key decision-makers and stakeholders led to several ground-breaking initiatives and significant original contributions which continue to drive the localization of value chains and the advancement of the Kingdom of Saudi Arabia (KSA). These include the development of the most advanced gas turbine manufacturing facility, which is a first for the Middle East, as well as the introduction of vocational education, based on the German dual model. In fact, this initiative saw the start of a massive training program with partners that culminated in qualifying the first generation of Saudi Arabian youth as gas turbine experts who built the first ever "Made in KSA" gas turbine in 2016.

In addition, Arja's engagements with customers and partners prompted the implementation of the Siemens Mechatronics curriculum in the Saudi Arabian education system, as well as an advanced technology exchange program that allowed young people to access cutting-edge technologies in global Research and Development (R&D) centers. Furthermore, he led the establishment of the first world-class digitalization center in Riyadh and leveraged his strong relationships with top universities to establish advanced digital curricula, thereby preparing students for the future world of work.

Arja has always been driven by an unwavering commitment to business which benefits society. While at the helm of Siemens Saudi Arabia, he frequently exchanged knowledge and insights in high-level engagements with the focus on the transforming energy landscape and its implications for society, as well as shaping smarter solutions for growing cities. As a highly skilled door opener, navigator and deal maker, he brought diverse stakeholders together and played a key role in authoring several studies which became inputs into policy-making decisions along Saudi Arabia's energy transition and strategies for smarter and more resilient cities.

"R&D took on an entirely different dimension over the past year, with society prioritizing vaccines against COVID-19 and businesses looking for innovative ways to serve customers," he explains. Arja's strategic orientation to R&D, and its role in addressing society's priorities, allowed him to leverage several key trends with customers, policy makers and universities, thereby clearly articulating and aligning priorities in several sectors and creating sustainable approaches such as the use of clean gas for power generation and establishing the right energy mix, including renewables.

Arja is no stranger to the proverbial "road less traveled" and during his career he has been spearheading several original contributions of major significance to society and industry. He personally coordinated the development of a holistic proposition—which has never been done before—to advance industrialization in the Kingdom of Saudi Arabia. By positioning Siemens as the highest value provider to Saudi Arabian society, he and his handpicked expert team worked side-by-side with several ministers and their teams to define the best investment framework, business models and implementation strategies to drive sustainable local manufacturing, skills development and job creation in the fields of power, transport, industry, healthcare and digitalization.

> Siemens Energy prides itself in shaping the energy of tomorrow with a strong commitment to making sustainable, reliable and affordable energy a reality.

Arja began his career in the fields of aviation and turbine technology and was responsible for the design and startup of several first-time applications with a strong focus on the U.S. market. In addition, he was deeply engaged in process automation technologies and being part of a technology and innovation group, he was responsible for the development and launch of the world's first web-based process automation system. Arja holds an MBA degree from IMD Business School in Switzerland, and an Engineering degree from the Technical University of Braunschweig in Germany. He is an avid reader and has recently been publishing articles from his LinkedIn account, providing personal perspectives on an array of technology-related topics.

Pushing the Boundaries: Electrification of the Aviation Industry

History remembers aviation pioneers like Otto Lilienthal and the Wright brothers, who at the end of the nineteenth century turned mankind's ancient dream of flying into reality with their earliest prototypes of aircraft. By the end of the twentieth century, a global quest was underway to realize the vision of flying an aircraft powered by solar power—and Arja stepped up to the challenge.

Many institutes and establishments took on this challenge and designed new concepts for harnessing solar energy by storing and converting it to propel an airplane. Arja found the idea of designing and building the world's first solar airplane fascinating and joined the icaré project, a collaboration between IMAB Braunschweig and the University of Stuttgart. He and his team worked together non-stop and pushed every bit and piece of technology. Despite several setbacks, they overcame the obstacles, and, in 1996, a year and half later, their vision became reality.

An airplane with a new eight-meter fuselage design and a wingspan of 25 meters, with photovoltaic cells covering the wings and tail surfaces was pushed out of the hangar and met all the airworthiness requirements of a conventional airplane from rollout to landing. The team designed it in such a way that a new electrical motor was fitted, which works along the principles of trans-rapid linear motor and permanent magnet technologies. The maiden flight of icaré was the culmination of all aspects of design and technology working together for success. After the maiden flight, the test pilot summed it up saying, "It is like being pushed by angels."

Arja vividly remembers the enormous time pressure and magnitude of the challenge—and the tremendous sense of fulfillment. "This major accomplishment with the dynamic and creative icaré team not only awakened a new technological chapter for mankind, but also advanced the quest to address a major global challenge—air pollution," he says.

About the company

Siemens Energy, headquartered in Berlin, is a global team of more than 91,000 employees across 90 countries. The company focuses on meeting the world's growing energy demand and ensuring climate protection. By deploying the best of its 150-year legacy, and pushing the boundaries of what is possible, the company strives for sustainability along the decarbonization journey, remaining innovation-centered on future technologies, and transforming with future-focused offerings, portfolio and mindset. Siemens Energy prides itself in shaping the energy of tomorrow with a strong commitment to making sustainable, reliable and affordable energy a reality.

Siemens Industrial Applications brings together best-in-class technologies of Demag, Alstom Industrial Turbines and the Rolls Royce Aero-derivative businesses, representing a string of acquisitions by Siemens to comprehensively address the industry in its entirety.

SIEMENS energy

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Suzanne Darmory

The Award-Winning Advertising Leader Capturing the Hearts & Minds of a New Era of Consumers

In 1988, when Suzanne Darmory was 14 years old, she wrote an essay detailing her future goals: she wanted two kids, her own advertising agency, and to make $40,000 per year. Today, that 14-year-old girl would be proud. Suzanne is president and founder of The AGNCY, an award-winning advertising agency leveraging strategy, data, and analytics to create best-in-class brand experiences with holistic advertising and marketing solutions. And The AGNCY's results never cease to amaze—a former client once referred to Suzanne as "The Client Whisperer." And with good reason. She brings more than 25 years of international experience creating ground-breaking advertising and marketing campaigns for Fortune 500 clients at world-class agencies, and a cache of over 100 advertising awards. She was recognized as one of the *Top 100 Business Leaders*, one of the *29 Most Powerful Women In Digital* by *Refinery29*, and among the *Top 100 Influencers in Advertising and Marketing* by MARsum, and featured on the *Where Are the Boss Ladies?* list. Her work can be found in publications like *Forbes, PR Newswire, Communication Arts,* and *AdWeek*, as well as on major networks like *MTV, NBC, CBS,* and *CNN*. She's worked with some of the most notable agencies in New York—Deutsch, Grey, Moxie, Ogilvy, R/GA, and more, and in London with Bates UK, Euro RSCG, Imagination, and Ogilvy & Mather. She's also served worked as an adjunct professor at the Fashion Institute of Technology, teaching advertising, and continues to be an active advertising judge, portfolio reviewer, panelist, speaker, and mentor.

In 2019, Suzanne brought her talent and experience to found The AGNCY, in Connecticut, with the motto "We are a new AGNCY for a new era," and already the firm's client list reads like a *Who's Who* of the industry. As a creative mind who lit up the industry from the start with innovative and influential campaigns, the immediate success of her firm came as no surprise to those she's worked with. In the late 1990s and early 2000s, she created the entire original websites for IKEA and L'Oréal Paris, as well as the global HSBC Premier "The World's Local Bank" campaign, which still adorns international airports—and the list goes on. But for Suzanne, the advertising industry is not just about creating ground-breaking ad campaigns. She is dedicated to creating a more diverse landscape for the future generations of creatives, to helping empower female advertising professionals, and to designing inclusive advertising content that speaks to the hearts and minds of the worldwide tapestry of consumers. *Top 100 Magazine* caught up with Suzanne to learn more about The AGNCY, what it takes to create an award-winning campaign, and how she's helping to pave the way for a new era of advertising.

Q: What goes into creating an award-winning campaign that captures the hearts and minds of consumers?

A: There are just a few elements things that go into an award-winning campaign but they're critical. One, you need a great story. Two is you need a great connection to the consumer. Three is you need ground-breaking, innovative creative. For example, my favorite campaign I've ever done was for Verizon Wireless. We came up with the concept of creating day to connect customers to Verizon and humanize the brand. We called it Connection Day, which was the day before Thanksgiving, and our goal was to turn the busiest, most stressful travel day of the year into a triumph for people. We partnered with Amazon, Apple, Condé Nast, Gogo, Boingo, Pandora, and JetBlue to give away free content and keep people entertained and connected all day. It was an astoundingly

successful integrated campaign resulting in 3.7 million visits to the landing page and 735,000 sign-ups, and it won a *DMA Echo Award* and was featured in major publications, including *Advertising Age, The Washington Post, The New York Times, PC Magazine*, as well as on *Good Morning America* and MTV. This is one campaign that I am particularly proud of, and still makes me smile.

Q: To what do you attribute your own success and that of your firm?

A: We take a modern yet human approach to helping clients share their brand story in innovative new ways, and I think this makes us different. We leverage strategy, data, and analytics to create best-in-class brand experiences with holistic advertising and marketing solutions. That includes branding, advertising, marketing, strategy activation, innovation, transformation, photoshoots, production, and social and provide the smartest marketing and advertising solutions possible. With respect to my own success, I've been really fortunate. When I started the firm, I had a lot of industry connections who really set me up for success. In my role, I'm equal parts leader, creative director, new business leader, and account director—and that's a rare skill set and I think one that differentiates me in the field. I have a profound understanding of what clients are trying to articulate without them having to articulate it. That means I'm able to really dig into their vision, their messaging, and their brand is just by talking to them.

Q: You enjoyed what many would consider an enviable advertising and marketing career before founding The AGNCY. What led you to start our own company?

A: I wanted to take my decades of experience that I had gained over two decades in the field and implement it in a new, fresh way. I have a core, hand-picked creative team whose skills and creativity complement one other and are the best fit for any given project or client, whether it requires a more seasoned mind with decades of experience or talented college grad. Consumers—their language, their interests, where they live in the marketplace, both digital and physical—are changing faster than ever before. Because of that, I believe that messaging must speak directly to a specific target or segment to create the most successful ads. This requires a variety of perspectives, worldviews, and experience. For example, one of my Jedi design students, whom I taught as an adjunct professor at the Fashion Institute of Technology, is now one of our art directors, focused on designing logos for our clients.

Q: How have advertising and/or marketing techniques changed over your career, and why is it important for companies to stay up to date on trends?

A: When I started my career, advertising and marketing were two different fields. Now they're more closely aligned with each other. The world is evolving so quickly now, there's always something new around the corner, so companies and brands must be proactive—not reactive—in knowing what's next. I am fortunate that I have the two best trendsetters for insights—my 13- and 11-year-old sons. I know what technology they're using and what's coming next, and that allows me to see what's about to explode and track it. A lot of my clients are looking towards social—TikTok, Instagram, Facebook, etc. but in many ways, I don't think it's about the next innovation, it's about the message and it's about understanding what that is before jumping on it. Unless you have the right message, story, and content, you're not doing it right. You might find the "right" social platform to engage consumers, but you'll still fail to capture their hearts and minds.

Q: You're a huge advocate for diversity, inclusion, and promoting women in business. How are you actively working to support diversity, and, in particular, females in the creative field?

A: It's wonderful that equality and diversity are being celebrated now, and inclusivity is finally a big item on the Fortune 500 companies list. The percentage of women running these companies is reaching an all-time high and the share of women sitting on boards has nearly doubled. Diversity is more than just male/female. It's gender, age, race, LGBTQ, ethnicity, disabilities, etc. The most successful, creative teams include people with these different perspectives. Each year, I pick a few young, new female creatives and help set them up for success. What I'm most grateful for is my former boss and ongoing mentor, Anthony Reeves. He's a huge proponent of equality in the workplace as a male voice supporting women and he taught me everything valuable to be a good leader and an amazing mentor.

We leverage strategy, data, and analytics to create best-in-class brand experiences with holistic advertising and marketing solutions.

Q: What do you enjoy most about your work?

A: I love being part of a larger cultural conversation in the world. Advertising has always been at the crossroad of pop culture, and I love being part of this. Incredible advertising provides entertainment, education, information, and changes people's opinions with different products and brands. I do a lot of inclusive advertising to help define, reflect, and promote this constant evolution. This just one example of how advertising can be not only an effective vehicle for brand exposure, but also be leveraged for the betterment of our industry.

RHETT BENNETT

Our objective is to fuel the electric revolution with an eye towards ensuring sustainable and ethical sourcing of battery metals, and strong environmental mining practices.

CEO & Founder

According to the United States *Congressional Research Report* of 2021, the U.S. is the second largest producer and consumer of energy in the world. Between 2000 and 2019, energy production increased by 42% and renewable energy production rose 91%. But the energy industry is in the process of transition. The electricity infrastructure of the United States is aging, and uncertainty exists around what technologies and fuels will be used to produce electricity in the future. This is a quandary that Black Mountain, under the direction of its founder and CEO, Rhett Bennett, is working to resolve.

Rhett established Black Mountain in 2007 and the organization now encompasses several business units that operate in the areas of exploration and production, electric vehicle battery metals mining, commercial saltwater disposal, and midstream infrastructure and in-basin frac sand mining. With over 127 years of combined engineering experience and over 99 years of geoscience experience, the Black Mountain group has evaluated more than $25B of exploration and production acquisition and divestiture transactions, and management has drilled 3,100 horizontal wells, as well as supervised the production of an additional 19,600 horizontal wells. Since 2016, the company has invested over $900M in natural resource development and built 6 in-basin frac sand facilities across the U.S., thereby reducing costs for E&P operators nationally, while becoming the 3rd largest frac sand company in the world.

Rhett's notable contributions to the energy industry have not only earned him numerous awards, including *The Oil & Gas Awards Future Industry Leader, Ernst & Young SW Region Energy Services Entrepreneur of the Year and National Finalist*, and *D CEO Magazine's Oilfield Services CEO of the Year,* but also piqued our interest in this foremost authority and trailblazing entrepreneur. We spoke with Rhett to learn more about Black Mountain's role in the energy industry and how they are paving the way toward the future.

Rhett, can we start with a brief synopsis of the divisions that operate under Black Mountain?

Absolutely. I founded Black Mountain in 2007 to capitalize upon opportunities in the natural resources sector. While our early investments were in oil and gas, a business unit we continue to grow today, we have diversified over the years and now have numerous business units. In the oilfield services industry, our business unit, Black Mountain Sand, began operations in 2017 to address the market void for high quality, cost-effective in-basin frac sand. Today it is the largest in-basin frac sand mining company

We bring together world-class assets, talented people, and strong capital partners to ensure the energy transition demand resulting from the electrification of the world can be met by helping supply the battery metals required.

in the world. In 2018, we established Black Mountain Metals to gain exposure to the rapidly emerging electric vehicle revolution. We took the approach of a focus on the derivative of natural resources extraction to this thematic, specifically *Class I* nickel sulfide and copper. We currently have ownership in five nickel mines and related midstream infrastructure in Western Australia. Just this year we have founded Black Mountain Carbon Lock, to leverage our subsurface expertise in the nascent carbon capture industry – one which we think will be enormous in the decade ahead.

And is there a collective strategy for these entities?

Yes. Black Mountain's strategy is to always maintain incredible intellectual curiosity and to pay close attention to global trends, even when inconvenient. Being in the natural resources business forces you to do that. We strive to be early movers, and a part of that is our understanding and tolerance of risk. When we arrive at a conclusion, we move right away. That has allowed us to be where others want to be, earlier. We are currently leveraging this model in Western Australian via our metals and upstream oil and gas divisions. The world is going to be in acute need of massive amounts of battery metals this decade, and we also fundamentally believe in the future of natural gas in Asian markets, in which Australia has a massive logistical advantage.

How is Black Mountain contributing to the energy industry's progress?

Black Mountain Metals is a global battery metals mining company facilitating projects from development and into production. We bring together world-class assets, talented people, and strong capital partners to ensure the energy transition demand resulting from the electrification of the world can be met by helping supply the battery metals required. Our objective is to fuel the electric revolution with an eye towards ensuring sustainable and ethical sourcing of battery metals, and strong environmental mining practices. As we focus on these energy transition projects, from battery metals mining to carbon capture, we also continue our traditional oil and gas production efforts. The electric vehicle revolution is here, yes, but we still have a crucial need for oil and gas production for 2+ decades ahead. We are striving to stay ahead of the curve in the delivery of the next generation of natural resources.

What led you to start Black Mountain?

The purpose of starting Black Mountain was to build the foundation of a durable natural resources business of which I could be proud. I wanted to identify and capture high-growth opportunities in the natural resource space. It was second nature to me, having been raised in a coal mining family, and my family was always wonderful in pushing me to venture forth and cut my own path in the world.

What does the future look like? How do you see the next 10-20 years playing out?

Global energy demand will continue to grow, as does the global population. This will mean we need to continue an "all of the above" strategy. Unequivocally, we will continue to need oil and gas, as well as need and welcome energy transition efforts. There absolutely needs to be an emphasis on investing in the natural resources required by energy transition if there is to be any hope of it occurring. The world is currently slow to capitalize good mining projects that support the electrification of the world. Mining is still seen as a dirty and hard business; that needs to change. Geographically, Western Australia is poised to become one of the most relevant and critical natural resources areas in the world. From nickel to lithium to copper to iron ore, it's endowment of critical minerals is unrivaled. That's a really interesting investment area to watch.

What do you enjoy most about your work?

I appreciate the game of business and enjoy seeing where our brand can go. I enjoy the challenge of creating, so oftentimes, our business activities take us into new areas where we see interesting and thematic fundamental shifts. And we then go early. Our brand and the company have created tremendous stakeholder value in a diverse set of businesses, something I'm very proud of.

Rhett serves as a board member of the Texas Alliance of Energy Producers, and as chairman of the executive committee of the Fort Worth Wildcatters, and member of the Independent Petroleum Association of America (IPAA), the Texas Independent Producers & Royalty Owners Association (TIPRO), the National Association of Royalty Owners (NARO), the American Association of Professional Landmen (AAPL), Young Professionals in Energy (YPE), and the Fort Worth Petroleum Club.

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MANUEL PEÑA

PRESIDENT & FOUNDER

Business tycoon and philanthropist Manuel Peña, president and founder of Peña Architecture and Engineering Corp., has earned crowning achievements in architectural design, investing, real estate, and planning development globally, making him one of the most fruitful entrepreneurs under the age of 40 in his field. Manuel is a well-organized and creative architect with successful national business experience in the design and construction industry. His skills in architectural design, project and construction management, office and team building, client relations, and public speaking have allowed him and his company to flourish. Since founding Peña Architecture and Engineering Corp. in 2012, Manuel has been instrumental in hundreds of projects in the United States valued in the tens of millions, and in the process, has built contacts with diverse booming business entrepreneurs and clients from across the nation. Recently, he has begun to forge relationships in the international market as well with a major resort project in the Bahamas projected for completion by the end of 2022, which will total to hundreds of millions in revenue.

The success of Peña Architecture and Engineering Corp. is fueled by Manuel's passion for customer satisfaction and client relations. He first seeks to understand client needs, and then creates detailed designs and action plans that, when implemented, rise above and beyond expected results. "What drives me is how my clients see me bring their vision to life," he explains. "When they have an idea and can't express it, and I'm able to see it and bring it to life, first on paper, and then seeing the joy in their face, whether it's a design for a business or an entrepreneur who wants me to build a futuristic or modern or traditional design for their home."

The success of Peña Architecture and Engineering Corp. is fueled by Manuel's passion for customer satisfaction and client relations.

As the company collaborates with diverse business and entrepreneurial clientele around the world, specializing in landscape, single-family, multi-family, and custom homes, as well as commercial, industrial, and mixed-use developments, they maintain the goal of creating personal spaces that are challenging yet engaging. Color, texture, light, and proportions come together to encapsulate the ultimate expression of client ideas. The aesthetic elements, the feng shui, the color, and the energy they exude are all important elements of Manuel's architectural feats. "Yes, architecture and design are science, but, really, truly, they are an art," he muses.

Echoing the organic architectural philosophy of American architect and designer Frank Lloyd Wright, who believed in designing harmoniously with humanity and the environment to enhance them both through architecture, Manuel is also driven by a philanthropic desire to better the communities that he services. "I'm currently speaking to the local leaders, commissioners, and mayors in Florida to help their people through a program developed by me. I want to give free arc floorplans to residents to help them renovate or rehab their homes without the cost of hiring an architect. I really want to help people. That's what drives me."

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PEÑA ARCHITECTURE & ENGINEERING CORP

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JEFF SWARTZ

Henry Ford is believed to have said, "A man who stops advertising to save money is like a man who stops a clock to save time." Jeff Swartz, president and founder of Ethic Advertising Agency, couldn't agree more—especially as we emerge from the COVID-19 pandemic. Jeff considers properly managed advertising an *investment* for generating revenue—not as an expense that can be cancelled or reduced to save money in the long run. As a hyper-targeted digital advertising agency and creative shop, Ethic Advertising Agency is known for their in-house digital advertising capabilities, media buying expertise, and creative development of video, audio, animation, and graphic design. While digital advertising and creative development is their bread and butter, Ethic began as a full-service ad agency and still actively provides traditional media buying and holistic strategic solutions. The international, award-winning agency offers a fully remote work environment with the bulk of their team in Pittsburgh, PA; Columbus, OH; and Morgantown, WV. The group has received numerous recognitions from *MarCom, Telly Awards*, *Pittsburgh Business Times*, *Hermes Creative Awards, ThreeBestRated, Expertise*, and more. While the accolades are nice, Jeff and his team feel their greatest rewards derive from having happy, profitable clients.

In addition to his role as president, Jeff serves as the company visionary and head of business development, guiding Ethic Advertising Agency both culturally and financially. While operating on a self-served demand-side platform (DSP), directly with publishers, and wielding some of the same tools that large media vendors and trade desks use, Ethic Advertising Agency maintains low entry points for new clients with superb capabilities. Jeff explains, "Clients and other ad agencies come to us for their programmatic digital advertising needs because we offer competitive pricing and outstanding results. Our team takes the time to consult with clients to gain an understanding of their goals, help them problem-solve, and, ultimately, achieve success. At the end of the day, it's always about discovering and doing what is right for the client and not just what is profitable for Ethic." The agency's multifaceted campaign-process includes communicating with clients regularly, conducting monthly digital audits of every campaign, and ensuring that clients receive personalized service and attention to detail.

Since its launch in 2014, Ethic Advertising Agency has seen steady growth in both team size and revenue. Despite the COVID-19 pandemic, the agency grew 16% with 2020 becoming their most profitable year to date. At the onset of the pandemic, Jeff's first initiative was client focused. He immediately set out to personally review all client campaigns, develop a customized strategy for each, and pivot. His next step was to devise a strategic plan for expanding the agency's business by evolving Ethic's brand, logo, and website as well as increasing networking and advertising spend. He didn't want to just survive the pandemic...he wanted to thrive during it. The plan not only equipped the agency to absorb any hits it took during the start of the pandemic, but it also enabled the agency to make up for those losses towards the end of 2020. Jeff attributes the agency's growth to its focus on company culture and client success. He sees his team as one of his biggest assets and has no doubt that Ethic Advertising Agency could not have grown without them. With that in mind, he was happy to share the prosperity of 2020 by sharing salary increases for everyone at the company. Jeff explains, "A good business leader focuses on

what his or her team needs to be successful and encourages those around them to progress forward in all that they do. Good leaders trust, empower, and support their teams to be the best versions of themselves." To put these beliefs into action, Jeff always promotes his "open-door policy" for speaking with his team and those outside of his organization. Jeff's professional path in advertising and entrepreneurship began at the University of Dayton, where he graduated in 2007. After earning a bachelor's degree in communications, he held various media sales positions at CBS-TV in Dallas, TX and Pittsburgh, PA, as well as working in media buying and planning at Levenson and Hill (since closed) for large brands such as Zale's Jewelry and Church's Chicken. He also dabbles in real estate investing through house flipping and rental properties.

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Kelli Maxwell epitomizes the concept of small business values with big business reach. She not only has the drive to pursue her own dreams - whether those dreams include princesses, coffee, or podcasts – she campaigns for the success of others. In her mid-20s, she was working as the marketing director of a financial firm, a position that gave her great insight into financial practice as well as the reach of quality marketing. However, Kelli was looking for something a little more creative, so during that time, she and a friend started a party company, Ever After Events, with a focus on providing professionally trained actors, dressed as characters for events. Kelli oversaw the payroll, administration duties and marketing, and they hosted parties throughout their local area of Billings, Montana. One time, Kelli even stepped in as a princess in a pinch (and had a blast) putting herself into role of actress from then on. The company took off, and soon there was a large demand for party services.

In July 2018, after growing her freelance marketing services due to the princess company's success, Kelli took the plunge into full time entrepreneurship. She sold Ever After Events, quit her full-time job, and founded Ember Marketing Group. After just two years, Ember Marketing Group now pulls in six figures, and Kelli is scaling accordingly by hiring employees and expanding her services as they sign on new clients. Part of her rapid success comes from the content style she has become known for, focusing on collaboration over competition. "People liked me and knew I could share their unique voice through content," she says. "I have a talent for making clients comfortable, so they can be authentic." Another element of Kelli's success was the fact that she made the decision to accept only one client per industry at a time. This way, she can really do a deep dive into each client and their needs, products, and philosophies to deliver the best results without walking the line of sharing trade secrets among industry experts.

As a creative outlet and to help shift the close-minded culture in their region, Kelli decided to start a podcast called *Campfire Hour,* that would attract not only clients, but also provide resources for other entrepreneurs who embrace the spirit of collaboration over competition. "There is always room for collaboration," Kelli believes. "We started the podcast to celebrate this because Montana is still very old-school in a lot of ways. The podcast was a place to have local guests, who are being innovative and doing ground-breaking, bold things, and share that." Today, *Campfire Hour* is in its third season, has two paid sponsors, and interviews guests from around the world. To bolster funding for the podcast, Kelli and her team started producing coffee as a tie-in product, Campfire Blend Coffee Co., in December of 2019. They developed a unique blend of coffee with beans aged in freshly emptied whiskey barrels from a local distillery. The whiskey-soaked wood imparts a woody, rich flavor, but the roasting process removes any alcohol. "You have the aromas and flavors of whiskey in your coffee, without the harshness of taking a shot of whiskey," Kelli says. "We took a risk, it worked, and people love it." They now have customers across the U.S. buying their coffee.

Kelli attributes her success in all of the diverse ventures to her willingness to be bold and try anything, as well as her spirit of collaboration and appreciation for working with local entrepreneurs, both on the podcast and via Ember Marketing Group. Thanks to this, Kelli has created a unique business community in the area and has become locally known as a connector and an influencer. In addition, she and her team exclusively create their own marketing content to keep things in-house and keep costs down. "I love connecting with other people who aren't afraid to fail and doing things bold and different from anyone else," she says. "I care more about relationships than dollar bills, and this has taken me farther than I ever imagined."

Gem Swartz

FOUNDER & PARTNER

catalyst

Gem Swartz thrives on solving business problems and spotting business opportunities as a marketer. For Gem, it's less about creating a pretty picture for the sake of aesthetics and more about delivering results for her clients. As co-founder of Catalyst Marketing Agency, she brings more than 20 years of experience to this full-service marketing agency based in Denver, Colorado, where she loves seeing her clients, and her team, thrive.

Catalyst Marketing Agency, founded in February 2016, might be relatively young, but that's never stopped them from attracting major tech clients like Adobe, Microsoft, and NetApp. "As you can imagine, these companies have very high standards and an arduous vendor approval process," Gem says. "So, it's a real honor to be able to work with these enterprise clients and be a part of an elite group of talented agencies despite our youth. I think it really speaks to our superior service, exceptional work, fresh thinking, and agility to meet changing needs." As co-founder and CEO of Catalyst, Gem leads the team by modeling the agency's values of being bold, delighting clients, and advocating for inclusion to deliver on the company's vision of being the most sought-after marketing agency for growth-oriented companies. Along with her talented team of strategists and creatives, Gem helps clients develop marketing programs and generate leads tailored to their unique needs and goals.

"We're very nerdy about results. We're constantly asking, did it perform? Did it do what we wanted? How do we continue to optimize and iterate?"

Catalyst combines creative messaging and branding with the mathematical rigor of predicting return on ad-spend, a powerful mix that helps clients successfully experience growth. It's this double-edged strategy that helps Gem and Catalyst stand apart from other marketing firms. "We're very nerdy about results," she says. "We're constantly asking, did it perform? Did it do what we wanted? How do we continue to optimize and iterate?" Her passionate and competitive nature drives her to constantly push the envelope and look for a better way. "In my mind, nothing is impossible."

Gem discovered her love of marketing and problem solving after graduating from University of California, Berkeley, and working with developers like Catellus, Taylor Morrison, and Benchmark Communities, helping them reimagine neighborhoods and create new spaces for people to live and work in the San Francisco Bay Area and Austin, Texas. For Gem, seeing communities flourish was deeply gratifying. Gem's zeal for bringing brands to life brought her to a boutique advertising firm, where she was quickly promoted to EVP thanks to her knack for management. She led teams in a fast-paced environment partnering with CPG, retail, and healthcare clients including Duraflame, Siemens, and Hill Physicians, helping them expand their market share in competitive industries, while also overseeing operations, creative, media, and client acquisition and retention.

Gem is also an advocate for small businesses and the unique issues they face. As a graduate of the Goldman Sachs 10K Small Business Program at Babson College, she is part of a strong network of small business owners across the country, with a collective revenue of $12 billion. After witnessing the struggle faced by so many small businesses in the wake of the COVID-19 pandemic, she served as state captain for Colorado, meeting with government officials to amplify the voice of small businesses. She also recently joined the Leadership Council of the National Association of Small Businesses to continue her advocacy work. And when she's not tackling business challenges, she's tackling fitness hurdles with her Peloton, which she loves so much she even brings it on family road trips.

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On the surface, Realty Executives International is a real estate company- a franchise system of more than 500 independently owned offices throughout the U.S., Canada, Mexico, and six countries overseas. But the franchisor, headquartered in Phoenix, Arizona, is much more. “We are a team of leaders,” says Patrick van den Bossche, president of Realty Executives International. “Our team comes together and works towards innovation, not just with tech, but with multiple customer solutions.” For Patrick, entrepreneurship and real estate run deep. He started his first business, a manufacturing company, at 26. He has been building and leading businesses ever since, doing his first meaningful capital raise of $14.5 million at just 29. He assumed the role of president of Realty Executives International in 2018, and today Patrick utilizes his skills gained over 30 years in business to lead the franchisor with a focus on support, knowledge, culture, and collaboration between brokers, agents, and consumers alike. His expertise has been recognized by several elite organizations, which have invited him to join their ranks, including the Young Presidents Organization (YPO) for his business success, as well as the elite Chief Executive Organization (CEO) for his achievements as a community, business, and company leader.

Patrick and the Realty Executives team are hyper-focused on supporting top-tier brokers and agents throughout the world- in whatever form is required. The company has developed avenues for entrepreneurial agents to create and advance their careers through expanding their niche, leading a team, or opening their own office. Likewise, the freedom and flexibility provided to broker/owners has allowed them to build long-term businesses with options for healthy, sustainable, and scalable expansion, without the strict guidelines often seen in other franchise systems. “Real estate is more than buying and selling homes; it’s a business where we give brokers and agents an ability to have business ownership without the burden of being all on their own,” said van den Bossche. Believing that unparalleled customer service starts at the top, van den Bossche’s strategy is to prioritize those who in turn provide the most professional and friendly service to buyers and sellers. “Housing is one of the biggest needs out there, and a home represents the single most valuable asset in any person’s portfolio,” Patrick says. “For us, it becomes a multi-tiered responsibility.”

Realty Executives International sets itself apart from other companies thanks to its most valuable asset: people. According to a recent survey, Realty Executives attracts top producers because of their leadership, culture, business decisions, commitment, and viability for the future. “We make ourselves super accessible,” Patrick says. “We get comments about how responsive everyone within the company is, including vice presidents, presidents, and brokerage CEOs. It reflects what we believe and who we are. We don’t have a hierarchy with top people making decisions behind the scenes; it is all team focused and transparent.”

Patrick’s extensive background makes him the perfect person to guide both Realtors® and clients through the real estate process. A background in architecture, including earning the LEED certification, taught him to be what he calls a “three-dimensional problem solver,” bringing creative solutions to any problem, as well as applying key communication skills. “I’m big on communication,” he says, “not sharing directives, but eliciting people to engage in that problem solving and to make sure I’m continually describing the vision.” Above all, though, Patrick loves what he does. His background, dedication to communication, and focus on his team has only continued to ensure success for Realty Executives. “Our team is very multi-talented, and we accomplish more and more each year,” he says. He enjoys spending time one-on-one with team members to learn about their individual strengths and needs, and to find the best place for them and their career. “We never lose sight of the fact we’re dealing with people, and people have good and bad times, so it is important for the team to help and lift one another through all days,” he says. “Thoughts become words. Words become action. Actions become character and character builds future.”

Christina Casile

OWNER & PRINCIPAL

design710

After a successful 14-year career working with large firms like EwingCole and Ballinger and designing notable projects such as MetLife Stadium, the New York Giants training facility in New Jersey, and the NASA Exploration Sciences Building in Maryland, Christina Casile launched her own firm, Design 710, in 2017. And she did so with a very specific market in mind—cannabis. With National Interior Design and LEED certifications, Christina leads one of the few female-owned design businesses in this unique market, and she's quickly made a name for herself as a leader in this burgeoning new industry, having been featured in *Marijuana Venture Magazine* in 2019 and in *Philadelphia Style Magazine* in 2020.

Design 710 specializes in designing cultivation and production facilities, dispensaries, commercial kitchens, and laboratories for cannabis businesses. Since opening its doors, the company has continued to grow. Christina has designed multiple facilities in her home state of Pennsylvania, including six dispensaries with Restore Integrative Wellness Center in the greater Philadelphia area, two dispensaries for "super license" holder Ayr Wellness, and a cultivation and manufacturing facility for DocHouse in just the past four years. Her roster of clients includes national and international medical and recreational cannabis businesses operating in Massachusetts, Connecticut, New York, New Jersey, Maryland, Virginia, Missouri, Illinois, Ohio, and the Bahamas, and expansion underway in the US Virgin Islands.

Christina first got involved with the medical and recreational cannabis industry when she was recruited to join a team of experts to help clients obtain permits for growing, processing, and dispensing marijuana. Design 710, a member of the National Cannabis Industry Association, was selected due to Christina's expertise in providing building and zoning code analysis, budgeting and scheduling as well as design. Focusing solely on the cannabis industry means Christina's cornered something of a niche market. "Larger firms won't touch this area because it's still too small and it's not federally regulated," she explains.

As a one-stop shop for her clients, she helps them from beginning to end, from finding real estate and going through the application process to helping with the finishing touches on the construction. While Christina handles most of the processes herself, she also brings on consultants and engineers as needed to ensure the best possible results and enjoys working collaboratively with other professionals and experts in their fields. Since 2017, she's seen significant growth in the industry as cannabis and cannabis products have become further decriminalized across the country.

Design 710's projects take on unique challenges of converting properties and creating spaces that are modern, attractive, and comfortable while still complying with state and local laws. Her designs feature blends of elegance and comfort, modern minimalism and organic textures that make them appealing to people of all ages and backgrounds. By employing cutting-edge design concepts often utilizing eco-friendly practices, Christina has been able to develop a diverse and proactive business style to meet the often challenging needs of her clients. Many of her client companies are woman- and veteran-owned, as well. For Christina, giving back to the communities she designs for is also a deeply important part of her work. She supports a number of local food pantries and veteran focused charities in and around Philadelphia, and donates to organizations in client locations, as well. Engaging with the communities that her clients will serve is key, and meshes with the company's collaborative mantra, "Together is better."

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Don Kellar

CEO, National Client Manager, Senior Geologist

Don Kellar is a professional geologist—licensed in California, Florida, and Texas—as well as a general A and well drilling contractor. He specializes in green energy and sustainability consulting; assessment and remediation of environmentally contaminated sites; hazardous waste management and compliance; and engineering and seismic assessments. Over the course of his 20-year career, Don has been directly involved with the assessment, remediation, and closure of hundreds of locations and has personally conducted environmental due diligence on over 10,000 properties throughout the United States and Canada—totaling over billions of dollars in real estate transactions. As the CEO, national client manager, and professional geologist of Fulcrum Resources Environmental, Inc. (Frenviro), he leads a growing team of experts who provide clients with trustworthy and cost-efficient methods as well as quality and timely delivery. Based in Los Angeles, CA, Frenviro is a full-service environmental, engineering, and energy consulting firm, which has emerged through both the Great Recession of 2008 and the COVID-19 pandemic as one of the nation's leading environmental business enterprises.

Frenviro was co-founded in 2007 by Don and his wife, Ling Cao, who built the women- and minority-owned business organically from the ground up. Committed to the ever-changing climate crisis, the firm offers nationwide coverage and specializes in performing environmental and engineering due diligence for real estate transactions, surface and subsurface assessment, and remediation of environmental contamination. When dealing with environmental contamination, team members assist a variety of clients—investors, attorneys, small business owners, lenders, and brokers—from initial due diligence to identifying any problems before they invest in properties. "If there's an issue found during the discovery phase, we initiate the exploratory phase—the actual collection of data for determining if a human-health issue is present, or the market value of the property is subject to liability. Then, if that data reveals a problem, we go into the remediation phase," Don explains. "We underwrite the risk and liability exposure, which aids potential investors in determining if they're making good investments." Frenviro's goal is to help solve environmental issues so that property owners not only make a profit, but also protect the environment.

When providing green energy and sustainability consulting, Don and his team perform energy audits and energy benchmarking to assist clients with obtaining a green loan—essentially energy retrofitting buildings to help save money as well as the environment. "We're doing our part to assist with energy savings and climate change, and we strongly believe that it starts at the micro level—one property at a time," he says.

With a lifelong passion for environmental science, Don started his career as a project manager as well as health and safety officer, managing field activities on sites throughout the San Francisco Bay Area and Southern California. He then went on to manage the sites of 28 gas stations, successfully working with regulatory agencies to meet cleanup criteria. Don also conducted environmental and engineering due-diligence inspections on thousands of sites, including commercial, multifamily, light and heavy industrial, and special-use facilities throughout the continental U.S., Hawaii, Alaska, Guam, and Canada. Today, he is a member of the National Registry of Environmental Professionals, the U.S. Green Building Council, ASTM, SIOR, and the Environmental Bankers Association.

Don is not only a successful entrepreneur, but he is also a successful musician. He has already recorded six albums and is currently working on a seventh album with his eight-year-old son—who is an aspiring up and coming drummer. Even as an artist, his entrepreneurial spirit shines through, as Don also serves as the CEO and marketing manager of Audio Asylum Guitars, a company that specializes in custom artwork and design for guitar models.

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Will Morris

Founder and CEO

Will Morris is a serial entrepreneur who is passionate about innovating, ESG, and helping others succeed. Over the past decade, he has used his general contracting, real estate, and import/export licenses to focus on solid investments, which generate substantial returns and positive impacts. Will has value-added over 3,000 multifamily units, scaled and sold businesses, developed single-family homes, served as a strategic partner on multiple investments, and sourced funds for countless deals and worthy causes. He is also a sought-after speaker and the author *of 6 Months to 655 Units: How to Break into Multifamily with Zero Capital and All Social Media*. Still, those who know him best say that his true superpower is his ability to connect with people. As founder and CEO of the Blueaura Group—a Tennessee-based, boutique private investment firm—Will offers a modern, sustainable approach to the conventional investing space while providing a sense of Southern comfort that quickly puts clients at ease. Once they get to know him, they are eager to invest in his company as they feel confident that he will do right by them. "I commit to treating every dollar invested and every opportunity pursued as a personal extension of who I am and what I stand for," says Will. "While I'm responsible for the general direction of the firm's investment strategy and overall capitalization, I'm equally committed to long-term and successful relationships with our investors, partners, and colleagues."

> Will offers a modern, sustainable approach to the conventional investing space while providing a sense of Southern comfort that quickly puts clients at ease.

Will got his start as a general contractor doing rehabs for multifamily assets, which soon led to a transition into importing granites, cabinets, and fixtures. Then, in 2018, he began syndicating for other people and was ultimately introduced to the capital market space. After starting his first company, Morris3rd Capital, Will discovered several aspects that he disliked about the industry and established The Blueaura Group in April 2020 to focus on sustainability. "Once I started working in the capital market space, I began to see a lot of things that could be done better—and doing better is at the core of my company," he explains. "I grew up on a farm and enjoying the outdoors, so it kills me to see all the pollution that continues being produced today. Sadly, most private equity firms focus only on returns without thinking about the good they could do."

To offer an alternative solution, Will has leveraged his real estate and ESG experience to make Blueaura a one-stop shop for investors. As a licensed contractor who owns a property management business and an import distribution company, he manages his own assets and obtains supplies at wholesale pricing. Along with the benefit of maximum returns, Will maintains full control and applies a tailored ESG mandate to each investment. "I want my kids to experience nature down the road just as I did, so we must take care of our world—for us and for future generations," he says. To help lead environmental efforts, The Blueaura Group targets renewable energy options, waste reduction, water conservation, and focuses heavily on lowering their overall footprint. "While we won't be the total fix for the environment, our goal is to start a trend that others will follow," says Will.

Along with sustainability, real estate and entrepreneurism play important roles at Blueaura. While observing the detrimental effects of the COVID-19 pandemic, Will decided to create work programs to help the tenants who were struggling to pay their rent. He and his team members have also started conducting evaluations to determine how they can improve their tenants' overall quality of life. Resultantly, Will has made several positive changes, including creating community gardens. "When my family had a garden growing up, it taught me work ethic, patience, and more," he explains. "So, now I like to provide a garden that each community can benefit from." The Blueaura Group is different from most real estate investment firms in this regard, but it is possible that others will soon follow the company's example. In the words of Will, "Good is contagious."

Blueaura
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ROXANA GROSU

Texas Medical Technology

Roxana Grosu has been a successful global corporate leader and entrepreneur for 14 years, with her finger on the pulse of business far and wide. She's been featured in *CEO* and *CFO* magazines and on *Fox News* and has led multinational companies with hundreds of locations worldwide. In February 2020, as she was running her own burgeoning company, she saw the COVID-19 pandemic racing across world and seized the opportunity to help. Roxana quickly pivoted and launched Houston-based Texas Medical Technology to fill the growing need for innovative medical supplies to keep people safe—from gowns to sanitation drones to self-propelled "germ" robots. "I thought, what will be needed? Everyone concentrated on masks, but I saw a niche for products that would be needed not just during the pandemic, but well beyond," she explains. Roxana absolutely nailed it. Demand for her ingenious products skyrocketed—and so did her company. What started as a company with three founding members a little over a year ago is now a thriving organization with 173 employees and over $45 million in sales. "Demand has been nationwide; it's been insane," Roxana says.

> "What I enjoy most is that I know I'm making a difference in this difficult time."

Texas Medical Technology offers a number of robots designed to clean and sanitize areas quickly and efficiently, all carefully designed, developed, and tested. Products include the GermRover, a self-propelled robot designed to clean hospital floors, and the SaniDrone, a drone that can sanitize an entire stadium in 20 minutes. The company also supplies all the V.A. hospitals in the U.S. with their medical gowns and is currently in negotiations to supply SaniDrones to multiple stadiums as they prepare to reopen. And it's not just cleaning robots. They've also developed the StepSafe, which automatically dispenses a sanitary shoe cover, and the SaniCart, a system for sanitizing shopping carts, which is already in use in major shopping centers in the country.

Roxana credits her team to the company's success. "The company wouldn't exist without my amazing employees," she says. "I hired people with different backgrounds and skill sets, and I hire a lot of women. Eighty percent of my employees are female. They're dedicated and persistent, both in pursuing business and being attentive to our clients." As a woman working in a male-dominated field, Roxana knows how important it is to uplift other women and serve as a resource and role model for the emerging generations and break down remaining barriers to women in business. Having worked with a global company, she has the unique ability to connect people and has developed excellent communication, interpersonal, and presentation skills, including being fluent in English, German, and Romanian.

"What I enjoy most is that I know I'm making a difference in this difficult time, keeping our health care providers safe, and it's very fulfilling to know we're helping people who give so much back to us," Roxana says. "This is a little bit I can contribute to help keep them safe with our gowns and robots." She also encourages would-be entrepreneurs to go for their dreams. "I would tell them to never listen to anyone else's fear, because when I was in college and I had a job in the government, everyone discouraged me from starting a business. They said, 'You have a lifetime job, great pay, vacation.' But it wasn't enough for me. If you feel you can do something, follow it and take the risk."

Roxana holds a degree in business administration and a certificate from Harvard business school in management/leadership.

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Ryan Young

Ryan Young has been in the recruiting business since before he graduated from the University of South Carolina, and even before that, working for his father in high school, giving him some 20 years of experience. “This is all I do,” he says. Two years ago, Ryan founded James Grey International, an executive search firm specific to the life sciences, serving as its president. The company motto, “Deliberate Search, Exceptional Talent,” says everything about Ryan’s dedication to finding the right person for the right role. And his dedication has paid off, with James Grey growing exponentially over the past two years. He credits this, in part, to discovering and engaging the right clients, his unique ability to develop long-term partnerships and to carrying on the relationships his father made in his own business.

> “It’s the genuine care and personal touch in every engagement and contact that makes the difference. As each relationship, partnership, and client grows, in turn, our company grows.

As business continues to increase with the abatement of the pandemic, Ryan expects to rev-up internal hiring by the end of the year while keeping a tight-knit company culture with personalized attention. “The future is very bright! Although we’re growing, we hope to keep the company small enough to maintain a personal touch,” he says.

Before founding James Grey, Ryan honed his expertise through various roles in recruiting with his first job out of college working for his father, who owned an executive search firm dedicated to the life sciences for more than 35 years. It was from his father that Ryan learned everything about recruiting and business. Over the years, he has worked in different facets of recruiting, from fast-paced contingency staffing to high-level retained search. These experiences have developed him into one of the most well-rounded recruiting professionals as he fully understands the business from all sides.

Ryan and his father had intentions of working together again, so Ryan could eventually take lead and carry on the family business, but before they could formalize a transition, his father passed away suddenly in 2019. As a result, Ryan started his own company, naming it for his dad and honoring his legacy by continuing to focus on executive search in the life sciences. As a second-generation search firm, Ryan’s business is rooted in family, which is why he also honors his daughter, Emma, with “Grey” being her middle name.

“Not everyone can say they are a second-generation search firm,” Ryan says. “I learned this business from my dad, who passed along all of his knowledge. I’ve known this business my whole life…it’s my true passion.” Ryan takes immense pride in every search, engagement, and relationship. And it’s not about the money; it’s about creating relationships, which build a solid foundation for his business. He is dedicated to exploring every option to find a match between a candidate and an opportunity. “It’s the genuine care and personal touch in every engagement and contact that makes the difference. As each relationship, partnership, and client grows, in turn, our company grows.”

Founder & President

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Traci Beagley

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To say that Traci Beagley, founder and CEO of Sunland Home Care & Medical, knows her community of Mesa, AZ, well is an understatement. Traci's great-grandfather, together with her grandfather, in 1958, built the first 55+ active adult community in what has become a national mecca of retirees in the Valley of the Sun. Her father, Craig Ahlstrom, Sr., continues to build active adult communities in Mesa.

Traci naturally grew up serving and working with seniors and given the litany of accolades bestowed upon both her and Sunland, it's clear that her devotion to this special group of people has never waned. Sunland was awarded *A Great Place to Work* in 2019 and 2020 and was named #4 on the *Fortune Best Workplaces for Aging Services* 2020. Traci, herself, has been featured in *Scottsdale Lifestyle* and in *Volume 2* of *The Know Book Phoenix*, a global group of female entrepreneurs and businesswomen, and was recognized by Healthcare Insights as one of 20 most influential health care entrepreneurs to watch in 2021. But it's not the awards that drive Traci as the passionate leader of a company that specializes in in-home private-duty nursing services for senior citizens and one-on-one caregivers to assist them with daily living. It's the joy and fulfillment in knowing that she's helping seniors enjoy their golden years every day.

> **"Now I can help seniors stay in the homes my ancestors built—and to age as safely and gracefully as possible in their own familiar surroundings."**

But Traci could not have known in 2016 how changes in her own life would sharpen and clarify her commitment to her company's mission. In 2018, just two years after opening the doors of Sunland, she was diagnosed with stage 2 breast cancer. As a survivor who endured the emotionally and physical toll of prolonged treatment, it was this personal experience that deepened Traci's empathy for those she serves. "I know what it feels like to need others to help, when the doctor's orders are confusing, when the sheer number of appointments is overwhelming. It's very complex, amid a difficult disease," she shares. "I now relate with those I work with closely in a deeper, even more meaningful, way."

"Our goal is to provide a high continuity of care with nurses and caregivers that fit with our clients not just in terms of skills, but also in personality. Seniors can feel vulnerable and apprehensive about having a stranger in their home, but after the initial contact, a relationship forms, and often the client looks forward to visits from our staff," Traci says.

Traci aims for her clients to feel a peace of mind, and as a Certified Dementia Practitioner, she knows well the importance of this. With continuity of care, the nurse or caregiver is able to note changes in behaviors and patterns and are attuned to whether the client is having a good day or not. And when a strong trust relationship exists, clients are more inclined to take their medications and follow exercise and hygiene routines. Traci also has realized a more nuanced effect of effective in-home care. "When the kids are trying to work out how to parent their parents, conflict often arises. With effective care, the kids can be the kids, the seniors can be the parents and grandparents, and our staff can work in a third-party capacity to supply the medical and other daily care needs as they arise."

As the face of the *Banner MD Anderson October Breast Cancer Campaign*, Traci spearheaded an effort that raised over $150,000 for breast cancer research. "I want to be an advocate for my clients," Traci says. "Not everyone has family members who can step in and help. I was lucky. I want to make sure that no one feels alone while navigating such a difficult time."

NATHAN TEINERT

After selling dozens of businesses worth millions over his 12-year career in private equity and eight-year career in mergers and acquisitions, Nathan Teinert could write a book about business brokers and what they have to offer both buyers and sellers—so he did. Drawing on his previous experience, as well as his current role as CEO and business broker at Graystone International, Nathan shares his in-depth knowledge of buying and selling businesses with those interested in the process, but who might not know where to start, which he also does for his in-person clients at Graystone. After debuting only three months ago, *Ready to Exit, A Business Sellers' Handbook*, is experiencing the same success and popularity that Graystone has enjoyed since its own debut. That's because Nathan knows how to develop his rapidly growing team into world-class brokers to meet their ever-increasing demand from business owners. Working with buyers and sellers, Nathan is also uniquely equipped to advise clients positioning their businesses for a future exit and has led many speaking events on the subject. "A lot of business owners don't even know there are business brokers to assist with the business selling process," he explains. "As we're working to become the most recognized name in the world in this space, we wanted to extend our reach beyond our firm." After just a few years of serving clients, Graystone has become a recognized name in the industry and is already conducting M&A transactions valued at up to $100 million.

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GRAYSTONE
INTERNATIONAL

Graystone International brings a team approach to meet the needs of both buyers and sellers across multiple industries around the U.S. and internationally, and works solely on commission so clients don't spend a dime unless they get results. For sellers, their proactive, proprietary system includes an in-house marketing team as well as access to their buyer network, which allows them to pinpoint the right match. For buyers, they dig deep to find the best vetted, on- and off-market opportunities, and continually build their network of buyers to pair with those looking to sell. "Our goal is to ensure no missed opportunities," Nathan says.

Graystone International has been seeing incredible growth since its launch. "I think one of the primary advantages is the relationships we have with buyers," Nathan says of their rapid progress. "One thing we've always believed is if you have the buyers, the sellers will come. We spend a lot of time building relationships with private equity firms and family offices that are suitable prospects for our clients. We have a good rapport and a large network, so our conversion rate is high." Their process is also key; thanks to Nathan's experience and his team's talent, Graystone helps business owners sell their businesses in only a few short months. "We don't just post 'business for sale' online and wait for sellers to come. We have strategic buyers in place that are ready to buy a healthy company promptly." They've been so successful doing this that a good portion of their business is referral-based.

Nathan believes not only in the power of Graystone's in-house marketing team and vast buyer network as something that sets the firm apart, but also in the energy and passion he and his team have for what they do. "This industry can be very outdated with old-school practices, but we take an innovative approach," Nathan says. He also recognizes the sheer impact these transactions can have. "This is usually a once-in-a-lifetime event, and it's very emotional and personal, and we understand that. Our clients get a sense of comfort when they talk to us because of the passion that we have for what we do."

Alexander Stefman

Co-Founder, President, and CEO

Alexander Stefman and his company, Parkway Autonomous, are making huge strides in the Connected Automated Vehicles (CAV) industry in New York City and New Jersey. Their Brooklyn-based firm, which Alexander founded in 2019, collaborated with vehicle manufacturers around the world to design and develop the CAVWAY™ family of prototype Connected Automated Vehicles (CAVs) for passenger and mass transport. The vehicle designs accommodate 2, 8, 16 and 30 person fit-for-purpose transportation solutions that have bi-directional travel at max speeds of 68 mph and have 220-mile range on SAE J2964 wireless inductive charging to allow for 24/7 continuous operations. Bi-directional vehicles use 4-wheel independent steering to provide numerous benefits such as more room for batteries and passengers, wheelchair accessible and ADA compliance, superior ergonomics and maneuverability, maximum operational uptime, fully autonomous capabilities and global safety standard compliance, and operate in dense urban environments for autonomous mass transit, connected, and dedicated guideways.

As president, Alexander heads project pursuit, CAV design development, manufacturing, and technical engineering. He also helps his team bring expertise and innovation to critical infrastructure designs that benefit the public as well as the private sector, creating and implementing modern, cost-efficient systems that support the vehicles.

Alexander develops strategies and technology to provide the CAVs with Ultrawideband (UWB)/5G connected communication and micropositioning for superior closed-loop control architecture. The technology allows digital precision lane keeping without requiring well maintained physical infrastructure like magnetic nails and painted lane lines. UWB provides an all-weather way to get the accuracies needed for automation with poor visibility and the seamless high accuracy that will be needed for connected automated vehicles. His team brings years of design and development experience to Parkway Autonomous to consult, advise, and strategically plan with regional transformation teams on the deployments for CAVWAY fleets in several major cities, including Houston, many public agencies in New York, as well as New Jersey, and both California and Wyoming.

As co-founder, president, CEO, and a patent holder, Alexander heads project pursuit, CAV design development, manufacturing, and technical engineering.

Transportation is far from a new endeavor for Alexander. His experience encompasses over 25+ years in transportation, technology, complex project design, operations, and management. His leadership team has long-term relationships with NYC and NYS Departments of Transportation and NYC Taxi and Limousine Commission.

Alexander has always been fascinated with technology and his interest in disrupting the industry with autonomous vehicles was a natural evolution. However, he was frustrated with the slow-moving vehicles available and the absence of integrated technology for on-demand deployment. Alexander and his team started developing their own vehicle designs with increased speed and capability. The CAVWAY™ vehicles have become an alternative to an Automated People Mover (APM) and scalable and flexible alternative for mass transit buses. CAVWAY's ability to enhance, expand, or replace technology without changing the infrastructure, make these vehicles and the technology to support them an approach that will transform the transportation industry.

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Tiffany Ferguson

> It's a little different, my passion. It's a feeling of knowing that others are feeling better about their own situation of getting up every day and making a difference, and me being a part of that picture.

Tiffany Ferguson never thought she would find herself in the health care field, but during her first year of graduate school, she was placed into pediatric nephrology and immediately fell in love with the dynamic. "It's fast-paced, and there's a wide array of patient population, because everyone needs health care in some way, so I fell in love with being able to use my kind of superpower—which is listening and helping—in this type of environment."

Today, Tiffany is continuing to use her superpower as director and CEO of Phoenix Medical Management, working remotely with other Arizona employees as well as with those in the company's headquarters in Pompano Beach, Florida. She joined the company in July 2020, and just six months later took the helm as CEO, a role she relishes with its unique opportunity to expand her focus to multiple hospitals and healthcare systems, which allows her to help an even larger number of people. As she drives the direction and content for her advisory firm, she provides expert knowledge and advice for hospital case management, helping healthcare systems improve their programs and their performance within a value-based healthcare framework.

Phoenix Medical Management serves hospitals across the country and has been for some 25 years. Most people in the company, including founders Stefani Daniels and Marianne Ramey, come from a health care background, such as social work or nursing, and are certified in their fields, so they can relate to those working on the front lines with patients, as well as having the experience of C-level business managers. With this unique dual perspective, they can provide top-tier education, advocacy, and program evaluation within the medical field. "Ours is really a boutique firm that is very specific to our audience. Our focus is about understanding all the details of the work from individuals that have actual experience doing the job rather than general consulting firms," Tiffany explains. "We're kind of inner-circle, so we really get what's going on in the industry, and we have a plethora of clients across the U.S. that we've worked with for decades."

Tiffany is passionate about helping the health care system because she knows that the more smoothly a health care system works, the better care and attention patients will get. "I'm all about advocacy for quality and safe patient care," she says. "We all come from the front lines and as leaders in the C-suite now really see this as an opportunity to ensure advocacy." Care management is not always easy and often involves intimate and difficult conversations with care providers and families. To that end, Tiffany and her team offer a lot of free general education and advice, as well as provide assessments to ensure that staff and management are working in harmony, no one is feeling overwhelmed, and that patients are getting the care and attention they deserve through optimizing the existing systems.

Phoenix Medical Management, Inc.

"When someone goes to the hospital, it's a whirlwind of events, and it's all sudden. Someone helps them through the process to get them returned to their daily lives, but who helps that social worker or nurse manage the stress and emotional impact of that time and again? So, we provide a lot of support so that those people can keep doing what they're doing." Providing that support for caregivers is what gives Tiffany the greatest joy in her work because her impact echoes far beyond the clients and into the general public. "It's a little different, my passion. It's a feeling of knowing that others are feeling better about their own situation of getting up every day and making a difference, and me being a part of that picture."

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Mahesh Pradhan

Mahesh founded Scope Retail Systems, Inc., an Arkansas-based information technology company that specializes in building custom IT products for the digital supply chain.

As a 30-year veteran of supply chain systems development, Mahesh Pradhan boasts a unique blend of business and technical leadership. After graduating from Mumbai University with a master's degree in physics and a diploma in computer science, he started his IT career in Lupin Labs and then became a system executive for BASF and Siemens, where he remained until 1992. He then set out on his "B2B journey from Bombay, India, to Bentonville, AR. Upon arriving in the U.S., he was hired as a programmer analyst by one of the largest retail chains in the world, Walmart. Mahesh then spent the next 25 years climbing the ranks—ultimately becoming vice president of supply chain. He also served as chairperson of the company's Asian Pacific Associate Network and represented Walmart in the White House Initiative on Asian Americans and Pacific Islanders. Additionally, he designed and developed the first warehouse management system for Walmart International, which has since become the foundation for the company's subsequent WMS systems. Mahesh served as an integral member of Walmart's growth from $48 billion to approximately $500 billion in 2018. During his tenure at Walmart, he and his teams won numerous awards including the *OCA National Award for Excellence in Corporate Achievement*, a *Pioneering Award*, *Paradigm Buster's Excellence in Customer Service*, *Industry Leadership in Business*, *Team Innovation in Technology*, *Global Industry Leadership in Technology,* and a *Star Team Award*. Then, in February 2018, Mahesh founded Scope Retail Systems, Inc., an Arkansas-based information technology company that specializes in building custom IT products for the digital supply chain. Based out of Bentonville, AR, the self-funded business has grown nearly 70% year-over-year.

Q: What led you to leave Walmart and to start your own business?

Walmart enabled me to see how rapidly business and technology was changing, especially in supply chain and retail sector. In late 2017, when an opportunity arose to start a company of my own, I remembered the words of Walt Disney: "The way to get started is to quit talking and begin doing." So, with the support of my family and friends, I decided to start the business.

Q: Tell us a bit more about Scope Retail and what it has to offer.

Over the past three years, we've developed and built many scalable and flexible IT supply chain related products. They are customized to meet the needs of our clients, using the latest technology—AR, VR, and robotics. One of our products is COSMOS, which is an order management system currently used by one of the top 5 grocery retailers. We also developed QuikPik—a micro fulfillment solution and SiREN, our generic integration engine. Another of our products called CALM, automatically processes claims using blockchain technology. We are currently building an Orion-Enterprise inventory visibility platform, which will enable multi-use cases by allowing organizations to gain visibility of inventory across the network. It is an extremely exciting time at Scope Retail.

Q: To what do you attribute your success?

Jim Rohn once said, "If you are not willing to risk the usual, you will have to settle for the ordinary," and I have never been willing to settle. It's important to have a drive for success, a clear vision, and an end in mind. Our company was also built on a solid foundation of relationship, trust and accountability. I've surrounded myself with great advisors and mentors, and I'm incredibly fortunate to have two exceptional business partners, Sandesh Ramnathkar, our CTO, and Tushar Agrawal, our CIO.

Q: Who has had the greatest influence on your life?

My mom, dad, and two elder brothers always demonstrated the importance of staying true to my values and who I am as a person. Throughout my childhood, our family of five lived in a house with one-room and a kitchen. I remember them all having a great work ethic and leading by example. They were also trustworthy and maintained good relationships with everyone around them—a legacy I strive to carry on today and pass it on to my children.

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John Miller

A high-impact national executive leader, John Miller has dedicated his entire career to making a difference in the world. Over the past two decades, he has led a diverse group of companies when they were needed most—building sustainable organizations, directing turnarounds to benefit future generations, and moving companies to a culture of performance. John has helped to feed the hungry, assisted the blind, provided disaster relief, worked to find cures and treatments for complex neurological conditions, and advocated for veterans and first responders alike. Given his extensive background and expertise, John also holds a highly visible profile in the media as a recognized business thought leader. He has appeared on every major network multiple times and has been featured in both national and international publications.

In 2018, John became president and CEO of two national nonprofit organizations: the Guide Dog Foundation for the Blind and America's VetDogs, which are both headquartered in Smithtown, NY. Under his direction, the Guide Dog Foundation has achieved its three most successful revenue years to date. In acknowledgment of his significant impact, John has received numerous honors, including *Leader of the Year* in *2020*, the *King of Long Island Award*, *CEO of the Year*, *Excellence in Business Achievement (two times)*, and *Top 40 under 40*, among others.

As president and CEO, John leads the Guide Dog Foundation in its mission to improve the quality of life for people who are blind, visually impaired, or have other special needs. Since its establishment in 1946, the charity has provided guide dogs and training, free of charge, to thousands of recipients. It was also the first assistance dog school in the U.S. to be certified by the International Guide Dog Federation and Assistance Dogs International. In 2003, the Guide Dog Foundation created America's VetDogs to provide assistance dogs to wounded veterans across the country. Although it became a separate 501(c)(3) corporation three years later, the two organizations continue to share staff and other resources to ensure the delivery of the best services possible. Their high-profile partnerships include NBC, *The Today Show*, and numerous sports teams, such as the NY Islanders, Washington Capitals, Houston Texans, and Atlanta United Soccer Team. Also, you cannot mention America's VetDogs without including their best known client, former President George H.W. Bush, who was matched with his service dog, Sully.

Because John is battle-tested when it comes to facing challenges, such as leading through the great recession, Hurricane Irene and Superstorm Sandy, he was well prepared to keep both of his current organizations thriving throughout the COVID pandemic. By implementing a four-pillar approach, he addressed safety, funding, programming, and strategic decision making. John prioritized staff and client safety, injected new energy in fundraising efforts, maintained focus on their mission delivery, and made decisions that would continue their pre-COVID momentum.

At the start of his career, John's most notable roles were serving as chief of staff at the Food Bank For New York City (one of the largest in the world); COO at Mercy College; and commissioner at the Department of Public Works in the Town of Babylon, NY. In 2011, he was named CEO of the American Red Cross on Long Island. There, he directed mergers of three chapters into one stronger organization and oversaw responses to national events, including Hurricane Irene and Hurricane Sandy. In 2015, John was also one of only 25 people selected throughout the nation to participate in LEAD, a prestigious executive leadership program directed by the Red Cross. Prior to his current role, John served as president and CEO of the Tourette Association of America (TAA), where he executed a turnaround by bringing in a new leadership team and strategic direction. His efforts resulted in a significant increase in the company's financial performance and moved the TAA from deficits to its first positive financial position in years.

John acknowledges his core philosophy of authentic management, building trust and role & goal clarity as the blueprint for success and credits the teams he has worked with over the years for achieving outstanding results.

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Jason Twiford

Senior Account Executive

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Jason Twiford grew up in Alaska in a log cabin with no heater, put himself through college at Chapman University, earned his MBA at the University of La Verne, all with the goal of a high-paying career. And, thanks to his drive and his faith, he's reached that goal. Jason is a senior account executive at Orion Lending, a nationwide wholesale lender founded in 2014, in Orange, California, with an additional operations center in Charlotte, North Carolina. Orion offers a variety of products, including agency programs, DPA, jumbo, and non-QM. Jason describes the firm as a seller servicer that utilizes exceptional technology and focuses on the broker relationship. Jason brings nearly three decades of financial experience and more than 25 years as a wholesale account executive to Orion, which he joined in December of 2018.

His responsibilities include managing timeframes and expectations to ensure loans are submitted and close on time. "I manage the flow of the pipeline, prioritization of files and resolve problems – the goal is to keep every loan moving forward as quickly as possible," he says. "I focus on getting the job done, from uploading the loan to moving a family into a new home."

In addition to this, Jason is also responsible for expanding Orion's network of brokers, which helps both clients and brokers alike, as well as his company. This continuous growth of his network has helped Jason tremendously. "It allows me to add staff and leverage the resources I have. Additional personnel allow us to give our clients a much more personalized level of service, we want to pick up the phone and resolve problems with one touchpoint. We leverage technology as much as possible and strive to give the broker a very positive experience, exceeding expectations on every loan." To ensure the most streamlined experience possible, Jason has his own dedicated operations team that handles the transaction from start to finish, with a list of daily priorities ensuring everyone is working in the same direction, with the same goal. "We've taken a very chaotic process and made it methodical, which allows me to deliver a consistent product to my brokers," he says. "In doing so, my brokers close their loans on time which drives realtors want to partner with my clients."

Combining his experience with one of the most difficult financial situations in recent history with his careful network building has proven hugely successful for Jason and Orion. Over the course of his entire career, Jason has closed in excess of $12 billion, ranking him among the top AE's in the industry. In 2020, despite the uncertainties of the COVID-19 pandemic, his total volume was over $450 million, compared to the previous year's $380 million. His success has earned him a place as a member of the Presidents Club each year it was offered and was named Washington Mutual's *Team Player of the Year* in 2006 and was their *Most Driven* winner in 2007, making him the only two-time Washington Mutual award winner. He's also won several incentive trips and prizes thanks to his performance, including trips to see the Olympics in Australia, Mediterranean cruises, and more.

> "I focus on getting the job done, from uploading the loan to moving a family into a new home."

"I love my job," Jason says. "It's dynamic. Every day presents a different set of challenges and I think outside the box constantly. I've been blessed with a fantastic team, and I work with some of the best brokers in the country. I never expected to reach the level of success that I find myself at and feel very blessed for my career and my family."

ORION LENDING

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CLUB FITNESS
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If you walk into any of the 19 Club Fitness locations in the St. Louis area, you might find that the employees' dedication to customer experience is above average. That's because these health clubs are completely employee-owned, in fact the only 100% employee-owned fitness club in the country. And this is all possible thanks to president and CEO, Eric Schreimann, who has been instrumental in Club Fitness' evolution since 2015.

Eric, a former professional baseball player, started working with Club Fitness in 2013 as their commercial banker. When the founder and then-owner wanted to retire, Eric presented him with several options. Selling the company back to the employees was right fit. Eric was hired on as CFO in 2015 to prepare the company for the transition process. At the end of 2015, Club Fitness was sold to the employees and Eric stayed on to help the company evolve into what it is today. "It was a very intricate process with a lot of planning and testing," he recalls. "It took a year to get this process across the finish line. In 2016, the evolution of the company began." After identifying the company's strengths, which were brand awareness and locations, Eric started looking into areas of opportunity, like member experience and setting the company apart from its competitors. "My strategy was to find leaders within, but also outside of the industry, who could bring new fresh ideas and concepts," he says. "I recruited from services industries like retail and hospitality—people who had a great understanding of customer experience and service."

After recruiting talented leaders, they started consolidating smaller clubs into 45,000 square foot large-box properties and built six of these super clubs between 2018 and 2019, investing over $35 million back into the company through equipment upgrades and new facilities. "Our strategy focused on the overall member experience while simultaneously providing a strong company for the employee-owners," Eric explains. "The employees truly have a vested interest in the company as well. You go to a Club Fitness and you're interacting with owners, not just employees, who care about the success of the company."

> "We are not just a place to come and run on a treadmill; when you come to Club Fitness, you get the full package. We pride ourselves on 'lifting local' by lifting our employees, our members and our communities to healthier and happier lives.

Today, Eric continues to meet challenges head on. Club Fitness was greatly impacted by the COVID-19 pandemic and so Eric worked closely with the Department of Health to create a reopening plan that allowed people to come back in, while maintaining strict safety standards for members and employees. He also led the company to become a member of the Medical Fitness Association and partnered with local medical communities for a holistic approach to wellness. "The future of fitness is all-encompassing health and wellness," he says. This means that besides fitness, they work with healthy food companies, host seminars on a wide range of health issues, and offer physical therapy options. "We are not just a place to come and run on a treadmill; when you come to Club Fitness, you get the full package." And that full-package mindset applies to the community, too, and they support and work with many local organizations to give back. We pride ourselves on 'lifting local' by lifting our employees, our members and our communities to healthier and happier lives."

Adam Marquis

Principal & CEO

Adam Marquis is a healthcare senior executive with 20+ years of combined medical, clinical, operational, financial, and education experience with expertise in whole-person, trauma-focused, social determinants of health, value-based patient care. In November 2020, he founded Marquis Consulting & Enterprises, LLC, in Long Beach, Washington, where he is principal and CEO. Marquis Consulting provides organizational development focused on meeting and exceeding industry standards of business intelligence, as it relates to optimizing the client life cycle and revenue cycle management. Adam focuses on unmet community needs and partners, working to provide staff with new credentials for more specialized care, as well as new service options and revenue. This creates better patient experience and engagement, improves appointment retention, leads to better revenues, and advances clinical outcomes. “I have helped companies become industry leaders through client/revenue diversification and technology advancement and by using these drivers, I can modernize and make them best in class, whether in urban, semi-urban, rural or frontier settings,” Adam adds.

One glance at Adam’s résumé, and there is no question as to his skill and expertise. His cache of certifications includes ACHE (American College of Healthcare Executives; on track for fellowship as a FACHE), HS-BCP (Human Services-Board Certified Practitioner), FPCC (PlaneTree International Fellow Person-Centered Care), and a LSSBBP (LEAN Six Sigma Black Belt Professional), as well as an MBA with a double concentration in healthcare management and human resources management. He has executed total turnarounds and startups for two fledging organizations, helping them become thriving community behavioral health centers in Washington State. At Willapa Behavioral Health, he and his team reduced turnover from 67% to 30%, using Studer Group and LEAN practices, Crucial Conversations, and Just Culture, to retain top talent and reduce 33% turnover costs per position. He also facilitated minimum 20% top line revenue growth year-over-year, utilizing McKinsey’s 7S Business Model out of Harvard University and his proven experience in all levels of organizational development.

Adam focuses on unmet community needs and partners, working to provide staff with new credentials for more specialized care, as well as new service options and revenue.

Adam holds all the medical, clinical, financial, and operational responsibility for the healthcare businesses he manages and helps healthcare companies of all sizes adapt and overcome challenges to thrive organizationally, regardless of the climate and setting. “There’s usually a big gap between clinical, medical, and business languages,” Adam says. “I speak them all fluently and can easily translate between the various partners in healthcare facilities to bridge the gap in their communication and ultimately, find the best win-win solution every time.”

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Monica Castaneda

Monica Castaneda's decision to go into health care was born long ago from a personal experience in her early years. "Growing up I saw my grandmother in a skilled-care facility, and my eyes were opened to how elderly patients were treated. I made it my mission to go into health care to change that," she says. In pursuit of her mission, Monica studied speech therapy in college, interning at one of the biggest hospitals in the Rio Grande Valley, where she assisted in the accreditation of excellence for an in-patient rehab facility. It was there that she realized that to enact real and lasting change for a vulnerable patient population, she was going to have to lead facilities herself. Today, that's exactly what she's doing. Monica is the health care senior administrator of a 67-bed facility in Austin, Texas, which specializes in geriatric psychiatric care. With a commitment to both the finances and the people, Monica ensures the facility—and the people in them—thrive.

With six years of experience in the health care field, Monica is charged with overseeing the overall operations of the Austin facility, ensuring the facility is in compliance with regulatory and safety standards while excelling in the overall quality of care in the facility and revenue. With people at the core of her work, Monica makes sure that the staff as well as the families of patients feel safe and welcomed. "I have found that when one spends the time to ensure that patients, staff, and families are happy and feel cared for, the facility will never fail," she says.

The power of Monica's skill in the business of health care facilities and her commitment to the people they serve was illustrated early in her career as the CEO of a 47-bed, long-term acute-care (LTAC) facility in Humble. She walked into the hospital teetering on bankruptcy. With a background in skilled nursing care, Monica had no experience in LTAC accreditation standards, however she committed all her time to learning them while figuring out how and why the LTAC was not thriving. With strict dedication to quality of care, within three months, Monica "flipped" the hospital, tripling its revenue, and transforming it into a facility with a waiting list of patients. "I worked with different skilled nursing facilities, hospice groups and home health agencies on ways they were able to work together, increase their referral base and quality metrics and eventually changed the overall perception of the building."

Monica brings that same powerful combination and dedication to her current leadership role at her current facility. "By ensuring that quality of care is superb, we're able to meet the Centers for Medicare Services (CMS) metrics, so when residents have a selection of facilities they want to go to, they see that we're a five-star facility," she explains. "With quality of care comes census growth because patients are our number one marketers when they leave our doors," she says. Getting high marks from CMS and maintaining a low rate of return-to-acute (RTA) also means that her facility gets more referrals from healthcare entities and managed care contracts. Since Monica has experience in almost all healthcare settings, she uses her knowledge to grow and retain patient census while improving quality and facility finances.

Monica is the health care senior administrator of a 67-bed facility in Austin, Texas, which specializes in geriatric psychiatric care. With a commitment to both the finances and the people, Monica ensures the facility—and the people in them—thrive.

Monica sets herself apart from other administrators because she's not only interested in the numbers and the finances, she's also deeply involved with the patients. "I truly care about the patients, so I'm on the floor with the staff and the residents, and the families all have my number. It just speaks volumes in terms of the care that I expect in the facility," she says. "The physicians, the patients, the staff, are all pleased and enjoy their work. We're all here with the common purpose of taking care of our patients, and I'm part of that. Patient care is our priority—for all of us."

In addition, Monica has opened a skilled nursing facility specializing in ventilator care and oversaw a facility she was able to get contracted with a national television show. She also spends her time responding to emergency situations as a cadre to an organization specializing in emergency response. Monica's mission is to not only make a difference, but a lasting impact in healthcare and in the lives of every patient she meets.

In addition to her bachelor's degree in communication sciences and disorders from Baylor University, Monica is currently finishing her MBA/MHA at Texas A&M Corpus Christi.

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Melissa K. Dobson

Founder & CEO

Melissa K. Dobson was in the business of helping people via technology and developments in clinical medicine as an associate general counsel of IP and innovation for Children's Healthcare of Atlanta, when she saw the economic downturn caused by COVID-19. With more than 20 years of experience in the field, she recognized another outcome of the pandemic—an entrepreneurial spirit emerging around the world, including competition spanning the globe such as in China and Russia. She knew that people were striking out on their own, starting businesses, and taking on new endeavors, and would need her expertise to compete on a global scale. As someone who once led a biotech startup to $6 million in revenue in just 18 months, and with a doctorate of law degree specializing in intellectual property and national security from Syracuse University, a Master of Science degree in cell, molecular biology and biochemistry from Binghamton University, and a University of Rochester bachelor's degree focusing on medicine and health policy, Melissa was the right person for the task. In July 2020, she founded the Southeast Innovation Institute (SEII), a not-for-profit 501(c)3 research institute, headquartered in Northeast Georgia. In its inaugural year, SEII has already served 150 clients across the U.S. and situated servicing teams across the globe.

From their Georgia headquarters, as well as offices in New York, Texas, Louisiana and Colorado, SEII operates through four divisions: R&D; the Small Business Innovator (SBI), which aligns the technological development of intellectual property with market opportunity across various technological areas of expertise and builds on the digital development of data that continues to shape our future; the Emerging Challenges Consortium (ECC), which seeks out economic and community needs and works to pair the right tech to those areas to create viable solutions; and the Commercial Capabilities Integration Hubs (CCIH; *See https://ccih.tech*), which provides technology for the U.S. military. "In a nutshell, we align the tech needs of the Department of Defense and government with solutions from the private sector," Melissa explains. Efforts also extend in partnering with military services and commands to facilitate the collaborative development of technology from the ground up. In this pursuit, Melissa leads teams of cyber-professionals, project directors, and IT experts to develop innovative solutions for both government and commercial markets, and as senior counsel, advises on business, intellectual property, cyber compliance and risk mitigation. SEII also collaborates on programs for the Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR), which aligns the technological development of intellectual property with market opportunities.

For Melissa, developing SEII has been a gratifying experience. "I love really cool technology, so to be on the cutting-edge of its application is incredible," she says. But it's not just the tech that fascinates her. "I love working with people and my role is fairly demanding, so there's that element of challenge that drives that momentum to success." It's no surprise that so many industries, start-up enterprises and college graduates seek her mentorship on healthcare, energy, transportation, and defense, or that she was published in *Launch Network* and holds two patents. As well, Melissa provides exemplary leadership, not only amongst peers but also as a model to her college age sons who have aspirations to serve communities spanning healthcare and defense.

Melissa leads teams of cyber-professionals, project directors, and IT experts to develop innovative solutions for both government and commercial markets, and as senior counsel, advises on business, intellectual property, cyber compliance and risk mitigation.

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ERIC BURG

PRESIDENT/CEO

In 1988, Eric Burg was 21 and had $40 in his pocket. Knowing no one in the field, he started his own advertising agency, working extremely hard and building his business one client at a time. Today, 33 years later, Apple Rock Advertising & Promotion, Inc. (dba Apple Rock) is a leading producer of event and environmental designs, including engineering, planning, and fabrication, as well as project management for large and small trade shows, corporate meetings, retail & pop-up shops, and various indoor and outdoor events such as virtual and live streaming. They design and build both temporary and permanent physical environments, ideal for customer engagement, meetings and point of sale events. They specialize in bringing brands to life in a 3-dimensional way to evoke human interaction and hands-on brand experience. "We'll go wherever someone wants to get in front of a customer and create a brand experience," he says. Apple Rock is unique in that all their steps, from concept design to manufacturing, are done in-house with their team of talented engineers, designers, and planners. Apple Rock builds both custom and portable exhibits in-house, they are G7 certified for color correct graphic production, which is critical for proper branding, and ranks among the top 40 builders in the event industry. Headquartered in Greensboro, North Carolina, they also have locations in New Jersey, and Nevada. Apple Rock also operates internationally in partnership with the Nomadic European brand.

"Apple Rock is a company focused on building a bridge," Eric says of how they help clients communicate their unique visions to customers and prospects connecting their brand with tangible sales results. "I can't think of another U.S. manufacturer that builds from the depth of what we do. We innovate, design, engineer, and build all in the same place." It's because of their unique, hands-on, and holistic approach to providing clients a custom solution from their vast menu of event and marketing services to meet their unique needs and goals. That has allowed Apple Rock to survive and thrive for over three decades. "That's a big deal in our industry!" Eric says. It's our innovation and ability to be flexible and creative that keeps clients coming back to Apple Rock; they can really do just about anything. "A large apparel corporation came to us with the challenge to turn three empty buildings into an event showcase, they needed to be gutted, renovated, and merchandised in only six weeks! We were able to get it done because our team rose to the occasion."

With the onset of COVID-19 and the reduction in in-person events, Eric realized quickly he needed to pivot once again. He adapted Apple Rock's Greensboro, NC manufacturing facility to produce PPE items like masks, gowns, face shields, hand sanitizer stations, and barriers after the state of North Carolina came to them with a request for a first order of 300 gowns that grew to an order of hundreds of thousands of gowns. Using their experience in environmental design, they've also developed modular testing sites, outdoor tents for drive-up clinics, and a portable bed that can be used in field hospitals and homeless shelters. As for events, Eric was also able to shift Apple Rock's environmental design from the physical to the virtual, creating 3D virtual meeting spaces that allowed people to experience meetings and gatherings while maintaining social distance. They had already been working with virtual technology for years, so the transition was easy for them. "I was able to be agile enough to completely transition the company into something new during COVID because my whole life I've been an idea person. I've always done projects that others may think are impossible," he says. He also plans to continue integrating safety and PPE products into Apple Rock's business in the future. "It became apparent that businesses have to have better safety protocols and that the meaning of safety has changed, so we pivoted into the PPE world, got our FDA registration, and got a compliance officer. We plan to make this a permanent part of our business moving forward."

While Eric and Apple Rock are planning on further developing their PPE and virtual event sectors, they're also looking forward to the safe return of in-person events. By providing virtual events and PPE now, they're contributing to the eventual return of live events, and are happy to be a thought leader in this area. After 33 years in business, Eric is confident that he and his talented team can take anything that comes their way and know they can continue providing excellent service and innovative ideas to their clients and communities.

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Hui Wu-Curtis

When Hui Wu-Curtis took a part-time job at a call center in college, she hated it so much, she quit after four months. But when she took another call center job a few years later, this time as a supervisor, she realized that a management position was far more interesting. Fast-forward to January of 2020, and Hui joined World Connection as president and COO, bringing 20 years of customer service experience and a career packed with awards, such as the *2017 CCW Customer Experience Leader of the Year* and *2020 Nearshore America's Top 20 Social Media Influencers*.

Founded in 2011, World Connection SA and World Connection LLC provide B2B and B2C call center, back-office, and business processing outsourcing services for all kinds of businesses worldwide. Hui is now headquartered in Guatemala City and travels often to World Connection's offices in Guatemala City and Boise, Idaho.

As she focuses on generating the company's short- and long-term strategies, driving growth and profitability, and overseeing the day-to-day administrative and operational functions, she leads a company ranked as one of *2020's Top Performers* by *Contact Center World*. The company took first place in the North American categories of both *Best Outsourcing Partnership* and *Best Contact Center Design*.

"It's been wonderful," Hui says of her time with World Connection. "There's never a dull moment. Things change day to day, and it really is like building an engine in a moving car. It just never stops. That's one of the fun parts of the job."

While she focuses on designing the company's unique niche in the outsourcing market and building the company's client base, she's not interested in making World Connection — which already has over 700 employees — into a massive corporation. "We're not a big shop, and we're not looking to grow to thousands of people, but what I want to do is to make our mark on the industry and create strong collaborations, so we can really innovate and be forward-thinking," Hui explains.

"We have clients from nearly every industry. Working with so many different people and projects has really afforded me the ability to see things that people may not ordinarily see, and understand what they need, as well as the ways the processes we can improve. We always try to think of creative solutions to best help our clients," she adds. "We're big enough to provide a comprehensive suite of services, but small enough to be agile and pivot quickly — we're not bogged down by bureaucracy."

"We're not a big shop, and we're not looking to grow to thousands of people, but what I want to do is to make our mark on the industry and create strong collaborations, so we can really innovate and be forward-thinking,"

It's this balance of personal attention, agility, and comprehensive service that Hui strives for, whether it's helping a hospitality client in Portugal double in size or advocating for a more diverse and inclusive workplace. "I think I have a keen understanding of people and always start internally with developing and supporting talent. Having a strong understanding of the overall business, coupled with strong leadership development skills, allows for my organization to provide true business value and partnership to our clients and customers."

Above all, Hui says she values being genuine, authentic, and transparent, as well having open and direct communication with clients and employees alike.

"I'm not focused on just the bottom line," she says. "I'm looking at how we build meaningful connections with other businesses to help them evolve and mature. When you focus on the right things — like building trust between people, and really understanding your client's business — that works to create the trust and the profitability that benefits on both sides."

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As the CEO and founder of AdvantageFirst Lending (AFL), Kurt Cymerint brings over 15 years of finance experience and a sincere affinity for both his clients and his staff. As the leader of a thriving firm, he focuses on fostering growth while staying true to the company's culture and mission of putting the customer first. When he founded the company in 2014 in Rancho Santa Margarita, based in Southern California, it was a small business, with just four employees for the first four years. In January of 2018, Kurt decided it was time to think bigger, and in just three years since then, the company has grown to 120 employees by 2021. To date, AdvantageFirst Lending has provided some $2.5 billion in loans for tens of thousands of clients across the U.S., many of whom have been with Kurt and his team since AFL's founding thanks to their high-quality, personalized service. With the extraordinary demand for refinancing as a result of historically low refinancing rates, Kurt's personal attention to not only his clients, but to his staff, has remained steadfast, ensuring that no employees were laid off during the COVID-19 pandemic. As the company's growth continues at a lightning-fast pace with funding close to $860 million in 2020—double of what 2019 was—AFL is expanding to continue to provide high-quality personalized service for its swelling customer base.

AdvantageFirst Lending specializes in both purchase and refinancing loans, including Jumbo, Conventional, FHA, VA, and Reverse Mortgages. However, it is the personalized attention and dedication to each and every client that sets them apart. Clients are contacted regularly with updates, and Kurt and his team even make sure to contact them in their preferred way, whether that's email, text, or phone call. "We genuinely care about the client and treat every single one of them like family," Kurt says. And it pays off: about 20% of their new clients come from referrals.

Kurt started his career in 2005 with Solstice Capital, where he was the top producer in both units and loan volume in the company. He was recruited by LoanDepot in 2009, where he built one of the top-performing sales teams before moving on to Home Financing, Inc., in 2012. By 2014, he was ready to set out on his own and founded AdvantageFirst Lending, using his years of experience to craft his own platform while keeping the needs of his clients at the front and center. After seeing friends and family struggle with maintaining communication with brokers he realized he could provide better, more attentive service. "I thought, 'I'm going to do this on my own to provide the level of customer service that I know is required and should be given to each and every person,'" he recalls. "This is the biggest transaction in people's lives—they're buying a home. At a high-volume loan warehouse, customers are just a nameless, faceless number on the sales column. I knew there was a better way. I wanted to put the client first, form long-term relationships with them and their families, and work closely with them to ensure that they were taken care of."

For Kurt, the greatest part of his work is twofold. First, there's the enjoyment of providing clients with service they can't get anywhere else, but there's also the opportunity to teach his employees the ins and outs of success, something Kurt is excited to pass on to the next generation of originators and brokers. "I like seeing it click for them and then watching dozens of employees achieve the same level of success that I did early on, and that allows us to serve thousands of more clients in the way we believe they should be served."

Andy Singh

Founder, Fund Manager & CEO

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Andy Singh is an accomplished real estate professional as well as a highly respected finance industry veteran and manager for a new hedge fund. With a focus on both commercial and residential properties, he quickly became a top licensed realtor in Utah and Nevada after entering the field in 2017. Then, having traded options with his own money for more than 13 years, Andy founded Royal Investment Adviser, Inc., in 2019. The following year—during the eye of the COVID storm—he established a hedge fund called The Driven Fund, LLC, which went on to beat the S&P 500 in 2020. Today, Andy serves a growing number of qualified clients with a net worth of $2.1 million or more, investing on their behalf in the stock market and securities listed in the US public exchanges "The success of my clients is what drives me every day, and I enjoy applying my skills, experience, and a variety of market tools to help them," says Andy.

The inspiration to establish Royal Investment Advisor and The Driven Fund came about after Andy began noticing that a lot of companies were specializing in a particular sector and that their results depended directly upon that one sector's performance. "I wanted to start a company that would not be limited to a specific sector and aimed to generate a positive return in any market conditions," he explains. This is why, unlike most hedge funds, The Driven Fund in not limited to a particular sector in the stock market, with the goal generate consistent, absolute returns through different economic cycles in both up and down markets. Their investment strategy involves taking long positions in securities that are expected to increase in value and short positions in securities that are expected to decrease in value. The fund also engages in different options strategies. "We use a lot of hedging to reduce risk and protect our clients' capital while striving to provide them with the best returns possible," Andy explains.

Andy's decision to pursue a career in real estate was also born from the desire to help his clients access better deals. Shortly after purchasing his first home, he discovered that he had likely paid above market value. The experience sparked his interest in correctly valuing properties, and it grew from there. Now, as one of the top realtors in the area, Andy has closed 60-plus properties in the last three years. Just as he strives to create wealth for his financial investors, he does so for his real estate clients, advising on the sale and purchase of multifamily units and commercial properties—mainly hotels and warehouses—as investment vehicles, with an eye toward seeking properties that have the potential to give them a healthy return on their investment. "My mission is to ensure that my clients receive fair, competitive prices whether they are selling or buying homes," Andy explains. "I do the same for my commercial clients as I seek properties that have the potential to give them a healthy return on their investments."

Andy has completed the Securities Industry Essentials (SIE) exam and holds FINRA Series 7, Series 66 security licenses.

> "We use a lot of hedging to reduce risk and protect our clients' capital while striving to provide them with the best returns possible.

TERRANCE MENDEZ

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After leaving his previous company in 2016, Terrance Mendez realized that his value proposition did not go to zero overnight. Certainly, there are other companies who need my skills and expertise." He took his 20 years of international expertise, including being the CEO of Dalwhinnie Enterprises, vice president of finance for Hitachi Vantara, and a partner-elect position with Deloitte, and founded his own company, AMOS Advisory Services, LLC, based in Centennial, Colorado. The company took off, counting among their clients one of the top video game companies in the world with a $21 billion market cap. "Before I knew it, I was north of $1 million in sales and had to bring on more support to meet the demand," he says.

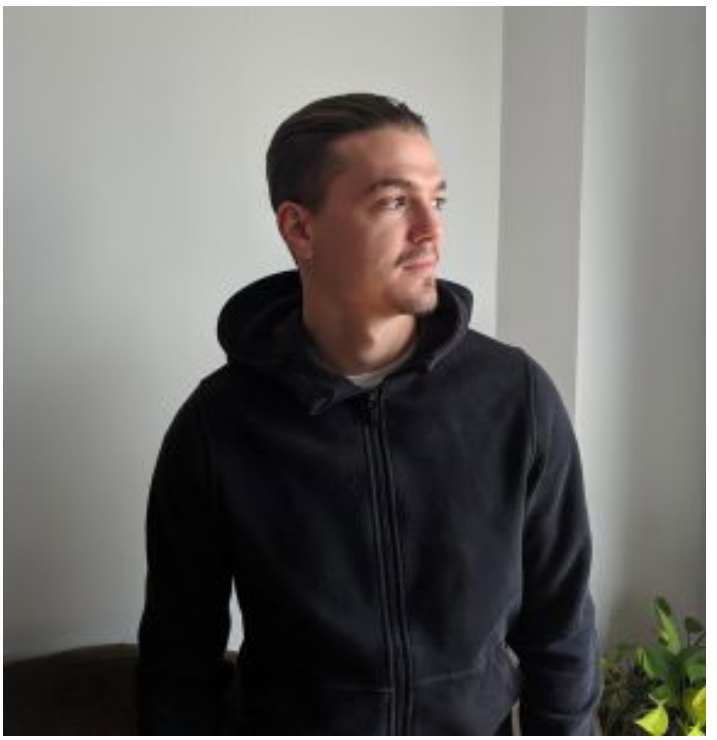
AMOS Advisory Services is a management consulting firm that provides business clients with personalized guidance that helps them accelerate the achievement of their goals. "There are a lot of consulting firms out there," Terrance says. "I am not trying to advise companies by simply providing them with suggestions and a generic plan. I am going to come in and make direct recommendations and then drive the approved effort through to completion. I roll up my sleeves, get in the weeds, and make things happen rapidly." To that end, Terrance generally only accepts clients through referrals, which allows him to choose to work hand-in-hand with the executive teams and their people to get to know them on a personal level and make change less scary.

As a Wharton School of Business alum, Terrance launched his career at Arthur Andersen, winning its prestigious *Leonard Spacek Award* as a top-performing intern—and he never looked back. Today, with his wealth of experience across finance transformation, business development, and process automation efforts across multiple industries, including tech and manufacturing distribution, Terrance brings a unique, multifaceted, and international approach to AMOS and his clients, working with companies in different capacities depending on their specific needs. For some, he serves as an outside consultant; for others, such as Hitachi Vantara, he assumes an internal leadership role as CEO, COO, VP of finance, and others. He also stays hyper-aware of emerging trends and technology so that he can integrate those things into his strategies for rapid, successful results. In addition, Terrance knows both the accounting and finance side of a company, as well as the leadership and operational aspects. "This is what makes me different. I have the ability to understand the techy part of accounting and finance, the business and operational aspects of a company, and can communicate the why's from a C-suite leadership position," he says. His deep knowledge of international regulations has also been a huge help when strategizing for companies looking to expand and operate outside of the U.S.

Earlier in his career, so dedicated was Terrance to doing more than just advising clients, that he made the difficult decision to turn down an offer to be a partner with Deloitte. "I had bigger dreams and wanted to do more than just advise. I wanted the responsibility and the privilege to drive the direction of my work with clients," he says. A role at Hitachi Vantara would become the turning point of his career, when he was given the opportunity to take a leadership role in crafting their new subscription services business. For his work, Terrance was one of only 12 recipients of the company's *Most Influential Persons Award* and was recognized at their global leadership meeting. He brought those skills to Dalwhinnie and used them to effectuate meaningful change, whether it be working with community leaders, launching a multiplatform marketing campaign, overseeing developments, or navigating tough legal concepts. Now, as the leader of AMOS Advisory, he uses the expertise and insight gained over his career to help his current clients build and rebuild their businesses.

Most recently, Terrance, through AMOS, was the CEO of Dalwhinnie Enterprises a Cannabis Investment Company. He led them through a major restructuring and expansion, launching a luxury boutique dispensary in Aspen, Colorado. Along with a luxury brand of cannabis and acquiring the Shift Genuine Cannabis Brand, he made the necessary improvements to capture 34% operating margins and achieve record setting sales. Subsequently, Terrance was named the chief operating and financial officer of GreenCore EV Services, a faith based electric vehicle charging company, and is working to raise capital while instituting the processes necessary for global reach.

While his illustrious career, filled with accolades, awards, professional achievements, and status, certainly reflects his skill and his dedication to the field, for Terrance, the driving force behind it all is the "human side"—the people he serves. He brings empathy and understanding to every encounter because he personally understands the stress business owners can face, and isn't afraid to tackle the most daunting problems. "My greatest accomplishment is always the thrill of helping others achieve higher levels of success," he says. Terrance holds a CGMA designation and CPA licenses across three states.



FORD SEEMAN

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Serial entrepreneur, social impact investor, and business mentor Ford Seeman is known far and wide for establishing businesses to help connect consumers and change the world for the better. With diverse experience and masterful insight that transcend far beyond his 34 years of age, he has built an impressive green investment portfolio and actively transforms industries through environmental innovations.

In 2018, Ford's love for the environment and concern over the lack of accountable behaviors toward carbon footprinting led him to establish Forest Founders, a New Jersey-based 501(c)(3) dedicated to creating tools for aiding individuals and businesses in becoming carbon accountable. The organization saw such astounding success that in 2020, Ford launched Forest Founders Rewards, a plug-and-play environmental incentives program designed to help consumers "go green" when they shop—and he didn't stop there. Just last year, he co-founded the New York-based online platform, Righteous Causes, designed for increasing exposure and facilitating interactions between early-stage social entrepreneurs and corporate social responsibility programs.

Even while balancing the multifaceted roles of founder, president, and CEO, Ford finds time to serve as an advisor for numerous startups—Givsly, Fabric, Bildbord, SeePay, WearWorks, and Unleesh, He also sits on the board of XcelPlus International Inc., which develops technologies for transforming trash into energy. Whenever he is asked about his seemingly endless determination, Ford gives the same response: "I became a social impact entrepreneur when my daughter was born, knowing that I had to be the change I wanted to see in the world and to continue the legacy of my late mother," he says. "I used to gauge my success by the brightness of my mother's smile, but now I can feel in my heart that she's proud, and that's what drives me."

Ford believes that both consumers and industry have the power to enact real change. Through Forest Founders, he and his team provide helpful lifestyle tips and educate members on the underlying issues of climate change. They also host a subscription program where members can donate to have trees planted on their behalf to help negate their carbon impact. It's an interactive endeavor that allows consumers can see the impact of their "green" behaviors through a personal dashboard where they can keep track of their environmental impact, set up monthly contributions, and earn rewards points.

As members accrue points, they can redeem them to purchase exclusive Forest Founders© merchandise or to plant additional trees. Also, by checking the organization's app to find participating businesses or by inviting their favorite stores to join its growing list of partners, members can shop as they normally would while using their purchasing power to help plant more trees.

As an increasing number of consumers are directing their dollars toward environmentally conscious companies, retailers can shine a light on their commitment to this collective endeavor through promotions and issue a unique QR code so that a tree gets planted each time a customer scans it. The Forest Founders app keeps track of the trees planted and even provides its users with impact statements. "By uniting and legitimizing our carbon accountability, for less than a single tank of gas, we can heal our planet tree by tree," Ford says.

Ford holds a bachelor's degree in political science from Lesley University and an associate's degree from Fisher College. He currently serves as growth chair of the Founders Network New York City Chapter, a global community of tech startup entrepreneurs.

Katie Kaps

Co-Founder & Co-CEO

As co-founder and co-CEO of HigherDOSE, Katie Kaps is the imaginative leader of a one-of-a-kind spa experience at the intersection of wellness, health, and beauty. Named one of the *Coolest Small Businesses in NYC* by *Business Insider* and one of the *101 Best Women-Owned Brands* by *NBC News*, their innovative services and products are taking the country by storm with a following that spans from celebrities to health aficionados to busy professionals everywhere. Founded in 2015, Brooklyn-based HigherDOSE is a rapidly growing, premium wellness/beauty brand offering differentiated spa experiences in and out of home. Combining the benefits of infrared and healing light therapy, their signature Sauna Blankets and Infrared Mats leave customers feeling euphoric and rejuvenated—truly glowing from the inside out. With the 2021 mission to make their Sauna Blanket product the center of an at-home spa lifestyle, HigherDOSE is undoubtedly on their way to fulfilling their goal, with demand quadrupling overnight with the onset of COVID, as people quickly adopted the idea of self-care in the confines of their homes. HigherDOSE has both people and the press addicted to their benefits, with more than 1,000 mentions across media, including features in *The New York Times*, *Forbes*, *NBC News*, *Entrepreneur*, and other major publications.

HigherDOSE

Katie started HigherDOSE after seeing a need for a different kind of spa "to get you beautiful and buzzed all at once" using future-focused health therapies, like infrared, to increase those feel-good chemicals—dopamine, oxytocin, serotonin, endorphins (DOSE)—whether at their spa locations or through in-home spa-grade treatments. The idea took off. She developed a heating blanket that incorporates infrared and healing light therapy that leaves users feeling refreshed and rejuvenated. A day at a HigherDOSE spa might include an infrared sauna session, a soothing facial or massage, and a complimentary day-long gym pass—definitely not the tired day spas of generations past. And while people are lining up for an in-spa experience like no other, consumers—and hotels—are clamoring for their crown jewel that is the Sauna Blanket to bring the spa into their domestic sphere to ensure peace, growth, and mindfulness.

So, what is a Sauna Blanket? It's a heating blanket that increases the body's temperature and blood flow, just like during a workout, but without having to do all the heavy lifting, making it accessible for those who may not be able to engage in a "traditional" workout. Users can take advantage of the stimulating heat and let the infrared technology take over as it cleanses and detoxes the body. According to Katie, the infrared and heating technology works to pull heavy metals and other environmental pollutants out of the body, leaving users with a healthy glow and a soothing sensation to muscles and joints. "It's basically like having an in-home spa," she says.

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When Katie started HigherDOSE, she was most assuredly no stranger to business. She holds a degree in international economics from Georgetown University, where she graduated magna cum laude, studied at the London School of Economics, and hails from a successful career in investment banking, venture capital, and as a CEO for startups. As the director of international expansion for Tough Mudder, she took the company from $10 million to $150 million in sales, which earned her the title of *International Employee of the Year* in 2013. Prior to that role, she was a top-rated investment banking analyst for Merrill Lynch. With years of experience in lean startup methods, bootstrapping, pivoting, scaling, and branding, it's not surprising that HigherDOSE is one of only three percent of female-founded companies to secure venture capital funding. Now she's bringing together her business savvy and creativity to lead what might be one of the most unique, sought-after spa experiences in the market.

SUDHARIKA GOGNA

Head of Transformation and Quality

Sudharika is a visionary, thrilled by the desire to experiment. She is a goal-driven, client-focused executive with repeated success resolving multidimensional problems, improving performance, and generating value for multimillion-dollar global companies. Offered repeated success in conceptualizing and developing company policies and procedures associated with operations, supply chain transformation plans, business development and logistics for scaling business operations efficiency, process enhancement, streamline workflow, and increased cost-effectiveness. Her expertise is in leveraging technology skills and business domain knowledge to educate stakeholders on industry, is crucial to lead advise C-Suite executives and other key decision makers across multifunctional areas to successfully implement strategies. You might say that Sudharika's has a knack of driving excellence, innovation, and transformation as her name a unique one, and means "transformative lens," a truly apt meaning for her life's work and firmly believes in "Ideate till you succeed."

"I thrive in high-velocity, unstructured environments and possess the acute business judgment and communication skills needed to influence and collaborate with a variety of people and job functions."

Her experience in the industry spans 20+ years and she currently serves as the head of transformation and quality at Flexport, a tech platform for global logistics, which she joined in 2019. Her focus in this role is building operational resilience, including in-process design, organizational change, and collaborate on product priorities. She designs and leads complex global initiatives for both operations and go-to market teams. In addition, she brings the ability to build strategies from the ground up and actually implement them, while passing along the knowledge of their operations to the right people. "I make sure companies reach their goals," she says. Her strong sense of empathy and people skills also allows her to bridge the gap between creation and the emotional impact of change.

Today, Sudharika focuses on supply chain optimization, design, and transformation of process, and building and transforming teams, implementing technology, and building strategy. Working within businesses to transform them from the inside out. Truly an intrapreneur helping build vision and shift seamlessly between strategic, project management and execution tasks.

Sudharika started her professional journey right out of college in India by working with GE (now Genpact). She spent the first 14 years of her career supporting the capital businesses and then moving to the United States for the GE Aviation business, where she spent years implementing business strategies, as well as leading and managing a high performing team to solve the supply chain inefficiencies for one of their business units. She continued that journey with Genpact continuing to optimize repeatability and reliability of supply chain processes, conserving supply chain cycle time regarding order management & fulfillment across North America, before joining Brookfield Asset Management in New York for three and a half years as a global head of program management. This was a significant addition to her experience, where she shaped and built the project management office and introduced enterprise value streams and cohesive process excellence ecosystems. From there, she moved on to Cognizant, a tech consulting company, where she led the transformation of operational excellence functions, looking at supply chain and managing operations and finance, as well as implementing automation processes to improve their systems. Finally, she landed at Flexport, bringing a wealth of experience and insight to a company whose goal of making global trade easy for everyone aligned with her own.

In addition to her years of experience and her original bachelor's degree in business and commerce, Sudharika is also proud to be a recent graduate of Stanford's corporate innovation certificate, LEAD. and is a certified Lean Six Sigma master black belt. She is a trusted advisor and a practical and concrete thinker who is most powerful when reacting to and solving problems. Today, Sudharika loves being on the east coast, spending time with her family and being a role model for her 2 kids. And her future involves continuing to drive and execute strategies to harness the operating world and starting on her own.

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GERARDO BLANCO

Over the course of his 20+-year career with major companies like General Electric, Motorola, Energizer, and Carlisle Interconnect Technologies, Gerardo Blanco has developed a motto that says it all: *Simplicity Drives Productivity*. Today, as the newly installed director at GKN Aerospace, Gerardo is responsible managing the firm's nine buildings on their San Diego, California campus. As with many of his previous positions, including a 10-year tenure as director of operations at Carlisle, Gerardo is in charge of overseeing the company's quality, delivery, supply chain, and finances. With Carlisle, he handled the operations of some of their plants in the U.S., Mexico, and Europe.

GKN Aerospace produces components for military engines and aircraft, and other major clients include Pratt & Whitney, Rolls Royce, GE and Honeywell. They also produce many of the parts for the F35 Joint Strike Fighter Pratt engine. Their processes are unique, and they manufacture parts in a top-secret way that no other company in the world does. With an engineering degree and 100 different certifications, the last of which he earned from the Kelly School at Indiana University, Gerardo also has a deep understanding of the company's products and processes from the inside out, and has been working in the aerospace industry since 2009. His first job, back in 2000, was through General Electric's leadership program, in which he worked in a different position in a different city every six months. After that, he was a production manager for Motorola in their automotive department before being promoted to logistics manager. In 2011, he began what would become a 10-year career at Carlisle, running some of their largest plants with responsibility of sites in the U.S., Switzerland and Mexico.

GKN Aerospace produces components for military engines and aircraft, and other major clients include Pratt & Whitney, Rolls Royce, GE and Honeywell.

Today, he brings that wealth of experience to handle manufacturing, operations, and the financials for GKN, including risk and profit. "If the company makes money, it's on me, but if it doesn't, that's also on me," he says. To ensure success, Gerardo relies on his slogan of simplicity. "We live in a world that is already complicated, and people make it more complex with certain systems or processes," he explains. While he's a realist and understands the need for systems and processes, he strives to keep everything as simple and streamlined as possible. "When people stop wasting their time in non-value-add initiatives or tasks, things actually become more productive," he says. And he's got the record to prove it, boosting productivity and increasing output in every position at every company he's worked with over the past two decades. Today, Gerardo is looking forward to working with GKN for the foreseeable future, helping them streamline, simplify, and increase productivity the way he has in his previous positions, and is especially glad that he gets to stay in California with his family.

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Michael Martinez, CEO

> I enjoy helping my clients visualize the possibilities for their home, whether a remodel or custom build, and helping people figure out exactly what they want in a house.

Over 15 years ago, Michael Martinez launched his design career. He began in the engineering and structural department at a prominent engineering firm in Austin, TX then through self-study of design software and theory along with the support of tenured mentors, he expanded into a career in production architecture and property management. When the recession hit in 2008, Michael, like millions of others, was let go from his position—an event that would become a pivotal spark. Michael took his experience, natural artistic talent, and entrepreneurial drive and founded his own building design firm, Adamant Design Group, LLC. Located in Hutto, Texas, ADG is dedicated to designing homes that fit their client's lifestyle, whether it be a modest three-bedroom house or an expansive estate. With over 300 projects designed for clients across the state and beyond, Michael's reputation has fueled the company's astounding growth—400% in 2020 alone—with 95% of his clients coming from word of mouth.

With a passion for design and a true affinity for his clients, Michael is present in every project, from initial concept to completed construction. "I want to be involved in every detail to make sure my clients get exactly what they want," he says. Michael works closely with each client as well as with a network of expert contractors to iron out even the minutest detail of both the design and the cost to deliver the best and most affordable solution for the client. While Adamant Group traditionally focuses on residential design, they've expanded into light commercial projects, delivering the same attention to detail and commitment to quality that they're known for on their residential projects.

"I enjoy helping my clients visualize the possibilities for their home, whether a remodel or custom build, and helping people figure out exactly what they want in a house," Michael says. "We don't realize just how much our house can influence us in our daily lives and how much we influence our house in terms of design. If someone's house doesn't function right for them, they're not going to be happy there. If your house works for you, you're going to see your house as a haven. I like to help people design their haven." In addition to the technical aspects of design, Michael is in tune with its more elusive qualities that can often mean the difference between a house and a home. "The lack of windows in a room or the height of a ceiling can affect your mood for the rest of the day. There's a psychology to designing houses, and it's really fun to delve into these aspects that might seem trivial, but can make a big difference."

For Michael, the design process is just like any other artistic process, going in with a rough idea and letting the result emerge organically, sometimes in surprising directions, and always with the client in mind. "I don't do cookie-cutter houses. Every client is unique to me, so every design should be too," he says. "I like to think that I play Tetris all day long, trying to figure out how the rooms are going to fit just right to function best. There is no 'good enough' when it comes to my designs. I view my designs as if it were my own house. I would want a designer to put that same kind of care in my house, so I bring that care to my own clients."

ADAMANT DESIGN GROUP

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LIDA KOURITA

Strategy & Clinical Development Lead

Lida Kourita knows there are some things that are as true now as they were thousands of years ago. For example, one philosophical idea that really sticks with her is the Socratic concept that all one can know for sure is that one knows nothing. For Lida, knowing "nothing" is a key component to her medical practice. "For many diseases, we don't know why they happen, and, also, we don't have any treatment for them," she says. "This philosophy allows me to know I have a limit to my knowledge, which inspires me to keep learning and discovering." Similar is one of her favorite quotes, "Whoever cannot seek the unforeseen sees nothing, for the known way is an impasse," by Heraclitus. It's this dedication to constant learning and discovery of the unknown that's earned her a place on the *Top 5 Forbes Accelerators* in 2019, among many other notable awards.

Finding the unknown and unforeseen is critical to Lida's position as strategy and clinical development lead at DiscernDx, a precision multi-omics company located in Palo Alto, California, that aspires to transform the diagnosis and treatment of chronic diseases. Using a predictive, AI-driven platform, they're set to uncover multiple diseases via a systems medicine approach using multi-omics. By being able to detect chronic diseases more easily, they hope to also catch them earlier, meaning patients can start care regimens earlier, even in childhood, sparing them from potentially devastating symptoms later in life. In addition, she's also the medical innovation lead at neuroFit, a NASA spinout start-up, which uses eye-tracking technology to monitor and measure brain health. Her work with neuroFit has earned her a National Science Foundation I-Corps grant as the entrepreneurial lead of a team researching unmet medical needs in the field of neurocognitive decline and helped raise funding from Jumpstart Foundry. neuroFit has been awarded a $300,000 NIH SBIR/STTR Phase I grant, and now collaborating with research institutions like UCSF, UCSD, and the VA at Stanford. As if this were all not enough, Lida is also the international partner for Greece with the World Business Angel Forum, an affiliate of the G20 Global Partnership for Financial Inclusion, and serves on the Global Women Leaders Committee.

> "Sometimes, as people, we lack tools we need, so bringing science, medicine, and business to the same table brings solutions that a singular person could never imagine.

Lida earned her medical expertise working in London's medical system, in nine hospitals in various diverse roles, including pediatrics, which inspired her early disease detection work of today. Her diverse training gave her the ability to be comfortable in a variety of medical areas, and her artistic family background also adds to the multidisciplinary quality of her education and vision. "My brother, Yorgos Kouritas, is an orchestra conductor and my inspiration. In the arts, you must have a very clear vision of what you want to accomplish and then have people give their best performance because they share that vision," she says. "This is really important for any type of leadership—every person has a different charisma, so it is important to capture that." The exposure to all these facets allows her to have an outside-the-box, innovative approach to problems, and that also includes her time at business school. "Sometimes, as people, we lack tools we need, so bringing science, medicine, and business to the same table brings solutions that a singular person could never imagine," she says. "To have a diverse table and explore together what is possible and push the limits is important."

DiscernDx

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Rui Goncalves

Founder & CEO

Rui Goncalves is a global consulting executive leader with over 10 years of experience in international management consulting, delivering bottom-line results the world over. Originally from Portugal, he started his career as an internal consultant at a company in France before moving to a global European firm. Six years ago, he moved to the U.S., where he founded Magellan Consulting Group in September of 2018. Magellan quickly achieved a worldwide footprint, and now has three global locations—Miami, Florida; Passo Fundo, Brazil; and Paris, France.

The implementation management consulting boutique firm focuses on operations and supply chain, while bridging traditional consulting with digitalization and industry 4.0. For Rui, and for many of their international clients, it is the consulting company of the future, with digitalization and technology in the form of a "fourth Industrial Revolution," changing how businesses operate and make decisions.

"Traditional implementation consulting firms are focused on processes and people, so they don't take into consideration technology factor," Rui explains. "Because they are both becoming foundational for all business, we are bridging those two elements."

Over his decade of experience, Rui had seen how concentrating on only one aspect, "old school consulting", led to a gap in quality of service, and he founded Magellan to fix this problem by combining implementation management consulting with technology and advanced data analytics. In doing so, companies no longer have to work with multiple vendors that provide fragmented services, but with a single, robust team of experts. "That's our goal as a business, it's not technology or data, it's using those elements on a daily basis to help our clients be better prepared to make decisions on every level," Rui says. "That's the difference between us and a tech company that comes and installs technology, because that will be just installation of software, not management interaction with the tool. We bring the expertise to help them make the most of those tools."

Rui's vision for the future of consulting is one of problem-solving and one where all businesses will rely on information technology and data analytics—and Magellan is leading the way. But the most important element, according to Rui, is sustainability. "Without technology today, management solutions cannot be sustainable. If processes are not embedded into a system, they will not be used consistently," he explains. "Our Engagement slogan is 'no Excel left behind.' Many companies suffer from using Excel spreadsheets, but not technology, and therefore the processes and management tools are not sustainable."

"With our model, our projects give a substantial Return on Investment—anywhere from 300% to 1,000% - creating more wealth for everyone, including our clients, their employees, and our employees and associates – wealth creation for all stakeholders is our ultimate goal.

As Magellan serves a growing number of clients the world over, Rui's international experience from working and living in different cultures and countries allows him profound insight into how to bridge those gaps between global companies, as well. "We really live in a global society now, so companies need to align with global competitors to remain competitive. You really need to be the best in the world," he explains. But for all his clients, whether domestic or multinational, what Rui truly enjoys is creating a system and seeing it implemented in a way that allows everyone benefit. "Even though processes and companies are very similar from a consulting standpoint, the unique way they execute and create value is really what drives me," he says. "With our model, our projects give a substantial Return on Investment—anywhere from 300% to 1,000% - creating more wealth for everyone, including our clients, their employees, and our employees and associates – wealth creation for all stakeholders is our ultimate goal."

magellan consulting group

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Dr. C. Michael Gibson

What if your Apple Watch could help prevent a stroke? One in five strokes is the result of atrial fibrillation. This affects many people, although a good 30% of them don't even know they have the condition. Enter Dr. C. Michael Gibson, CEO of the combined non-profit BAIM and PERFUSE research institutes at Harvard Medical School and co-chairman of a new Heartline trial co-led by both organizations. This trial is an all-virtual, app-based randomized medical trial, the world's first on such a large scale, and the first trial involving a popular consumer product. The ultimate goal is to determine whether wearable tech like Apple Watch can lead to earlier detection of atrial fibrillation. At only 1% of the cost of a traditional trial, this trial is already fully funded currently recruiting, with the goal of enrolling up to 150,000 people in the U.S., and Dr. Gibson hopes it will be a way for people to improve their heart health in the future.

Dr. Gibson's commitment to improving the health and lives of people has driven his participation in many landmark discoveries from which thousands are benefitting, such as effective ways to prevent blood pooling in the heart muscle through using FDA-approved drugs to open smaller arteries, and inventing measures of coronary blood flow.

Dr. Gibson joined BAIM in 2017; however, this ground-breaking trial marks the most recent in a long line of important research for Dr. Gibson, who has spent decades leading large international trials of tens of thousands of patients. A practicing interventional cardiologist with more than three decades' experience, he's routinely named as one of *Boston's Top Doctors*, and has been ranked likewise by *U.S. News & World Report*. He's led 120 studies and phase 1-4 clinical trials in cardiology, all of which have been cited multiple times in literature. In fact, he was ranked as one of the world's most highly cited authors in all of science in the past decade by Thomson Reuters. The institutes he works with have led over 1,000 studies, published 5,500 manuscripts in the peer review literature, and have led 60 FDA submissions from their network of 7,000 sites worldwide.

Dr. Gibson entered medicine in 1986, and just two years into his career, founded an independent academic research organization, PERFUSE. "I felt like I had the right tools to answer the important questions early in my career," he says. "Oftentimes, people think of research as working with test tubes and slides. This is clinical research that involves people, so it allows me to be a doctor and answer the important questions all at the same time." Dr. Gibson's commitment to improving the health and lives of people has driven his participation in many landmark discoveries from which thousands are benefitting, such as effective ways to prevent blood pooling in the heart muscle through using FDA-approved drugs to open smaller arteries, and inventing measures of coronary blood flow.

In addition to being a major player in the world of traditional medical literature, Dr. Gibson is also well-known online, with more than 440,000 followers on social media. He attributes his unexpected popularity to his careful curation of stories that appeal not only to medical professionals, but to consumers as well, especially during times of stress and crisis. He reported on updates and news during the Boston Marathon bombings, the Ebola outbreak, and, of course, during the COVID-19 pandemic. "I try to make my writing accessible to a broad group of people," he says. But it's not only medical subjects you'll find on his social media, but his art, which has been featured in the *L.A. Times*. "This helps people connect with me personally. People want to know that there's a human being on the other side of social media, and they like connecting in that way." He's also the learned mind behind WikiDoc.org and WikiPatient.org, open-source medical textbooks with thousands of subjects for medical professionals and lay people alike, expanding medical knowledge for all. He's also founded Clinical Trial Results, a site dedicated to discussing the results of studies, and has frequently appeared on TV with Fox and NBC in Boston.

As for what Dr. Gibson loves most about his work, it's hard to top saving a life. "When someone is critically ill, having a heart attack and may die, and I get the artery open, and they're smiling and their family is smiling, there's nothing better," he says. And it's the human aspect of his work that not only keeps him going, but gets people interested in his work, too. "No one cares how much you know, unless they know how much you care," he says. "I use this quote all the time because it's so true. By seeing that I, too, have children, a dog, that I, too, struggle with so many things that they do, people develop a sense of trust in me."

C. Michael Gibson, M.S., M.A. (Hon.), M.D., FRCP, FAHA, FSCAI, FACC | CEO
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RUDMEELA NAWSHEEN

From an early age, Rudmeela Nawsheen's interest in engineering and entrepreneurship led her to envision the start of her own tech company—a dream that would one day become a reality. Named among the 50 Most Inspiring Bangladeshi Americans, she has honed her technology and business skills for over a decade in Silicon Valley, California, utilizing her technical and creative strengths to help people virtualize their imaginations. Rudmeela became one of the world's few female founders of a robotics/AI corporation when she launched ConfigVR in 2016 and ConfigRbot four years later. As founder and CEO, she oversees operations, finances, business development, and client acquisition while her expert team specializes in a vast array of content development, especially augmented reality (AR), virtual reality (VR), mixed reality (MR), animation, and renders. Based in the U.S and Asia, the team provides diverse solutions to industries including manufacturing, health care, defense, security, logistics, maintenance, automotive, and electronics. She launched ConfigRbot, her second start-up, with the goal of helping businesses implement automation to build the future. "Our mission is to help clients succeed in a world that is quickly moving toward robotics," says the tech entrepreneur.

Rudmeela's first startup, ConfigVR, is a business-to-business company that specializes in industrial, manufacturing, and automation process animation with the highest-quality renders and 4K videos. The company offers 3D modeling, game development, virtual tours, and content development for AR, VR and MR. The content is used for a variety of purposes, such as acquiring clients, obtaining funding, explaining the manufacturing process, training, advertising, and publishing for websites. "We maintain strict NDA rules and keep our clients' IPs secure," Rudmeela says. "Companies know they can trust us with their data and process. Any kind of content development our clients can imagine, we can build."

Launched in Silicon Valley, CA, and Dhaka, Bangladesh, ConfigRbot works to promote business development between the two countries while taking the robotics industry to the next level. "Our aim is to power the transformation of society and industry to innovate a more productive and sustainable future," says Rudmeela. ConfigRbot specializes in robotics, AI, chatbots, cybersecurity, IoT, skill development, software solutions, and management tools. They have various AI based software solutions. The company is also planning to extend its R&D and training program in both countries.

While leading two ground-breaking companies might be the pinnacle of success for many, Rudmeela's drive to innovate doesn't stop there. Her plan is to combine the services of both companies to specialize in using AR and VR with robotics. AR, robotics, and VR can then team up to develop innovative applications for various organizations. "VR and AR can offer an immersive medium to operate robots, and with the help of low-latency networks, people can remotely utilize robots using intuitive AR and VR controls," Rudmeela explains. AR, robotics, and VR can also be used together in various industry sectors such as manufacturing, robot training, healthcare, operations, space research, and exploration among many.

Rudmeela is a graduate of San Jose State University, where she earned a Bachelor of Science in electrical engineering and a Master of Science in digital communications and multimedia with summa cum laude honor.

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Brandon Hernandez

Co-founder & Senior Partner

Seasoned operations professional, Brandon Hernandez, has spent more than a decade in the food production industry. In 2017, he co-founded Whole Brain Consulting, a minority-owned, premiere food industry consultancy that operates out of Chicago, IL, and Boulder, CO. The Whole Brain Consulting team provides specialized assessment and management of contract manufacturer sourcing, food safety, quality assurance, quality control, supply chain and logistics, research and development, general operations, and private equity due diligence. The company has seen immense growth since its inception—more than 20% per year—even in the midst of the COVID pandemic. As testament to Whole Brain's success, Brandon was recently listed as one of the *Top 100 Food and Beverage Leaders* by the Global Summit on All Things Food (GSAF). Boasting more than 350 years of collective experience, Whole Brain's team of outsourced operations experts offer manufacturing and co-packing connections and comprehensive solutions customized to each customer's unique needs. As a company with global reach, Whole Brain works with clients throughout the world—Cambodia, Europe, Canada, South America, China, to name a few—facilitating both domestic services and export programs.

Brandon attributes the consultancy's rapid growth to his associates, most of whom are veterans in their given fields and specialize in one area. "We provide better and higher quality service and expend a lot of capital on high level personnel," says Hernandez. "I believe we currently have the best people in the best positions, and we continue to make that concerted effort as we maintain our talent pool."

Whole Brain Consulting

The Whole Brain Consulting team provides specialized assessment and management of contract manufacturer sourcing, food safety, quality assurance, quality control, supply chain and logistics, research and development, general operations, and private equity due diligence.

Much of Whole Brain's success is also due to the diverse services the consultancy provides. While some clients turn to Whole Brain for supply chain, others may come for beverage formulation, R&D, or a whole sweep of the other services the company offers. Most of their clients do not produce their own products, so associates frequently help them find manufacturers for their brands. As the needs of their clients change, the team expands to include experts in the newly identified verticals. "For example, we recently began doing due diligence for private equity firms," says Hernandez. "Essentially, we determine if the client is buying something of value or if it's a purchase that's not worth the money from an operational perspective." For such an evaluation, Whole Brain conducts a review of the manufacturing assets to ensure operations are stable. New brands receive an operational review of the leadership team.

Prior to co-founding Whole Brain, Hernandez spent a number of years working his way through the operational, research and development, supply chain, and quality assurance aspects of food manufacturing. After graduating from Colorado State University with a degree in biology, he began his career at Zateca Foods, where he focused on FDA compliance for this large scale food manufacturer, as well as supply chain, R&D, and general plant operations management. For more than 10 years, Hernandez worked for a manufacturer or for the customer base of a specific operation.

In contrast, Whole Brain's offerings span farm-to-table and most CPG brands, operating on a much larger scale and serving multiple client bases. Hernandez's background in science, experience in sourcing raw materials, and tutelage under several talented mentors equipped him with an in-depth understanding of food safety and prepared him for his current role as senior partner. "When I am evaluating a large-scale manufacturing line, there are a lot of facets—including water activity, pH and overall formulation of the products—which are contributing factors for bacteria to thrive in certain environments. My understanding of biology, chemistry, and physics allows me to understand how they all interact with one another."

Outside of work, Hernandez serves as a board member for Naturally Boulder and Naturally Network, both of which are educational hubs for the food industry. He also works with the Northern Colorado Rush Soccer Club and Soccer Without Borders. Hernandez is also deeply grateful for his family and his business partner, Will Madden.

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Maureen Wilner

THE WILNER GROUP
Professional Staffing and Talent Management Solutions

Maureen Wilner knows that to the uninformed, recruiters and agencies can get a bad rap. But anyone who's worked with her and her company, The Wilner Group, knows that this is certainly just a stereotype based in misinformation. That's because Maureen not only knows how to pair the right candidates with the right companies for optimal success on everyone's end, but because she takes the time to get acquainted with the strengths, needs, and goals of each of her many clients, and her dedication has made many a great match between companies and candidates.

Maureen brings over a decade of experience in the recruiting industry to The Wilner Group, which she founded in Montvale, New Jersey, in 2016. Prior to recruiting, Maureen was a director of operational audit with Siemens, which required frequent travel and time away from her family. When she realized that she was beginning to recognize the flight attendants from flying so much, she knew it was time for a change. She transitioned into recruiting, and says it's the best decision she's ever made. She met various business leaders and staff, and found she loved helping people reach new opportunities. "To help someone in their career and identify a new opportunity where they can be happy and successful and continue to grow is most rewarding," she says.

Maureen also personally knows about the importance of finding the right career match and identifying the wrong ones. After graduating from Berkeley Secretarial School in 1981, she landed a secretarial seat at a law firm, but quickly realized it was not the role for her. So, she went back to school and earned her bachelor's in business management, which allowed her to enter the business world and gave her the basis for eventually running her own business.

Today, The Wilner Group provides professional staffing and talent management solutions on a temporary, temp-to-hire, direct hire, and retained search for businesses of all sizes across the U.S. Many of their clients have worked with Maureen for more than 10 years, since before she founded her own company. Thanks to those relationships, Maureen has been able to grow her client base considerably on referrals alone. Being in charge of her own company also means that Maureen does not need to limit her focus in terms of the types of businesses she works with; she describes her company as "industry agnostic." To Maureen, it's more important to understand who a client is and what they stand for, as well as the vision, ethics, and culture of their company. "It makes the job easier because I am aware of who is on the other side of the table," she explains. In fact, one of the first things she requests from new clients is a one-hour meeting so she can get a feel for who they are. "It makes all the difference," she says. "The only way I can identify talent is to know who the client is and what they represent. Once I have that commitment, it is a fantastic partnership." To date, she's worked with companies focused on finance and accounting, IT and engineering, customer service, human resources, sales and marketing, and many more.

Running her own business was also a valuable learning experience for Maureen. She reached out to her expansive network and asked for advice on running a business, which further cemented those relationships. "I ran at about 100 miles per hour for a few years," she says. My team of recruiters "are loyal, driven, fun, and always do the right thing for both the candidate and the client" and her HR coordinator is "the glue that keeps us all on track."

When she's not matching talent and companies, Maureen loves to cook and plans out two-course meals most nights of the week. She has two adult sons, one of whom is recently married and expecting her first grandchild. She enjoys golfing with her husband and friends, exercising, and spending time with her fur babies.

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DANIEL CARDELLA

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A polymath with a love of humanity, truth, and the possibilities for Raja Yoga to transform the world, Daniel John Cardella (branded "UNCLe D"), is the founder of myflowfactory.com, the first U.S. human development platform-as-a-service (PaaS) company with a scientific method for delivering individuals into peak performance, samadhi (bliss/nirvana/heaven), and persistent flow states. As the leader of this innovative company, Daniel specializes in peak performance, flow and awareness states, human dynamism, genius creation, and the practical melding of humanitarian ways of being. Along with his role as a speaker and the proprietary musings creator of *Uncle D's DiGiTaL DiaRy*, his diverse professional background includes positions as an entrepreneur, hedge fund manager, reservoir energy engineer, data scientist, metaphysician, spiritualist, musician, and author. Set to release in 2022, his book**,** *SaMaDHiYOU! & the ScuMMy, SeLFiSH, SiMPleToN*, is a fun and effective guide for delivering readers into superlative states of peak-performance, pre-eminent health, and bliss.

Founded in 2015, myflowfactory.com specializes in educating, motivating, and en-training clients in the adoption of joy-state lifestyles that quickly convert dissonant brain, enteric nervous system (gut and body), and heart waves into resonance success. "We help people institute perfect decision-making by encouraging them to cycle flow-state play with learning by migrating from states of selfishness to states of generosity so that they may indulge in moment to moment joy and peak performance states" Daniel explains.

Myflowfactory.com's limited partner metaphysicians & flow state business partners (ushers) have access to myriad benefits, including:

> *• A turnkey, world-class human development content production company, which makes videos for clients and finds people who want to help others get into samadhi*
>
> *• A highly successful digital client/customer acquisition program, featuring live online bio-feedback, muse meditation, distributed yoga, and musical performance (dance, karaoke, comedy, and handpan)*
>
> *• An engineered samadhi acquisition protocol in a demonstrable wave resonance and ontological science (SaMaDHiYOU!)*
>
> *• Back-office business billing and business development suites (initial Usher Partners granted up to 250 hrs. worth $1 million+ in UnCle D Human Development time to convert subscribing users)*
>
> *• A world-class thinking and self-realized Raja yoga master (Daniel as Swami Devananda), who is dedicated to developing happy, healthy, wealthy, and wise flow state (samadhi inducement) Ushers and content consumers.*

According to Daniel, "Flow states—characterized by selflessness, timelessness, and effortlessness—are what people experience when they feel their best, perform their best, and are wholly present." At myflowfactory.com, flow state engineers evaluate and entrain the brain and enteric nervous system speeds in connection with various human behaviors. "As evidenced by corporate partner Muse, bio-

feedback meditation devices enable pre-eminent health, brilliance, and peace/love states that are slow and low theta brain-wave speeds between 4 and 8 hertz," Daniel explains. "Likewise, sickness, ignorance, and violence, caused by dysfunctional thinking and behavioral patterns, are fast-waved alpha and beta wavelengths ranging between 30 and 50+ hertz."

Daniel and his team were able to assemble myflowfactory.com due to the knowledge and skill set he garnered throughout his career. During his time on Wall Street, he founded and led a direct-investments portfolio management position at Millennium Partners— a leading multi-asset hedge fund with assets of over $50 billion. Within this role, he learned the science and art of successful private-equity business strategy and execution. Following subsequent training as a reservoir engineer and machine learner, Daniel became deeply impressed with the need for a national human development industry and for humanity to engineer peak performance within the divine experience.

Today, Daniel is especially proud of his company's scientific data and human development platform as a solution (PaaS) toward samadhi acquisition, moral decision making, and peak performance. All metaphysician ushers are invited to leverage their unique PaaS by exploring the joy of behavioral ways of being modalities—music, play, and machine learning—for evaluating perfect moral decision making and energetic bio-wave resonance within the human body. "It is our privilege to unleash individual divinity and the energetic power of classic 'shaman & sexy witch' iconographic behavioral modalities by leveraging contemporary energy economics, unified field mechanics, and the meditative sciences," Daniel says.

Inquiries for all human development, muse (bio-feedback), meditation, and SaMaDHiYOU! are welcomed at Danny@thedigital-lounge.com."

JOSH CHANDLER

CHANDLER CABINETS

With more than 25 years of experience in construction and millwork and a passion for technology, Josh Chandler is CEO of Chandler Cabinets, Inc., one of the most innovative companies in the industry, setting the trends—and a high bar—for all others in the Dallas-Fort Worth metroplex area since 1976.

Combining artistry that reaches back generations and into the future with the best technology to bring their clients' visions to life, Josh and his expert team of designers, planners, and construction professionals specialize in creating exceptional cabinets and environments for a wide range of commercial, residential, and public sector projects. Whether individual clients customizing their own home or an award-winning builder, Josh and his team are driven by their commitment to building the perfect cabinets that fit their unique tastes and to providing a seamless, enjoyable experience from start to finish. "As a family-owned company, we are committed to upholding our most cherished values in every task we take on," says Josh.

Originally founded by his father, Buster Chandler, the company started out modestly with only six employees. Today, Chandler Cabinets has grown into a state-of-the-art facility, employing more than 250 BBA professionals. Thanks to an award-winning customer service department and a team of expert installers, planners, advanced CAD designers, and certified crafters, every order is turned into a masterpiece. "We're a large company, but we have a small-company perspective and approach, working closely with each of our clients to ensure their satisfaction," Josh says. The same holds true for the Chandler Cabinet team. Josh, like his father, views the staff as family, having worked with many of them for more than two decades, and he recognizes their talent, commitment, and loyalty with annual awards.

Interestingly, Josh initially had no interest in following his father's footsteps into construction. Instead, he began college as a pre-med student, but decided after his freshman year that he wanted to take a different path, after working summers at his father's factory. He left college and dove into architecture and drafting. He fell in love with it, and then realized that he could help the business if he brought his CAD skills into it. "My dad was drawing designs by hand, and I'd watch him, thinking, 'There's got to be a better way.' So I brought all this new technology into the company and launched the company into a whole new stratosphere."

Josh officially joined the company in 1997 as a draftsman and installation manager, and then moved into business development as a chief designer within his first few years. By 2014, he had assumed the position of CEO, and he and his brother, Colby, joined forces to purchase the company two years later. "I'm an innovator. I have the visions, and my brother makes them happen, so we make a great team," explains Josh.

While the company has grown and evolved over its four decades, the visions and dreams of its customers remain the company's number one priority, and first-class customer service continues to be exemplified by its staff. "We understand that families have different needs and tastes in cabinetry, so we are committed to designing and building the perfect cabinets for each of them, and making the entire process comfortable and stress-free by personally guaranteeing the superiority of our products," Josh says.

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Connor J. Ferguson

In 2009, Connor J. Ferguson faced one of life's greatest challenges: turning a negative situation into a positive one. When the global financial crisis led to a drop in stock prices, he was among the thousands of employees who lost their jobs at HSBC. Determined to prevent such a predicament from reoccurring, Connor became an entrepreneur in the health care industry the following year—ensuring that the next time a catastrophe occurred, he would be in charge. In 2015, he partnered with four doctors to co-found Premier Medical Management (PMM), Central Maryland's largest physician-owned managed service organization. Headquartered in Howard County, Maryland, the company was established to help independent physician practices remain independent and to make local neighborhoods healthier places to live. They have since grown to over $40 million in projected revenues for FY 2021 and have expanded across the Baltimore and Washington, D.C. metropolitan areas. Over the next five years, PMM plans to continue expanding across the mid-Atlantic region.

FirstCall Medical Center
Urgent Care - Labs - X-Rays & Diagnostic

The company's growth and success continued full speed ahead—even when the next global crisis came in the form of a global pandemic. Connor promised himself that no employee would lose his or her job due to COVID, and he not only kept his promise, but also hired an additional 200 people. The research arm of PMM helped to develop the Johnson & Johnson vaccine; over 600 people participated, one of the highest enrolling clinical trials sites in the world. They also developed two rapid COVID 19 tests with Abbott, one of the country's largest manufacturers of lab supplies and equipment. After partnering with the State of Maryland and the local county government, they also began overseeing the operations of a mass vaccination site, where they administered over 40,000 vaccinations.

Healthcare Equity is another initiative at PMM, which was executed by launching drive-thru virtual offices, strep testing, and COVID testing services with no appointments required. For people who are unable to drive, the company sends mobile testing buses to underserved neighborhoods. Over the past 12 months, staff members have administered over 200,000 COVID tests. "We are empowering and improving physician/patient relationships through better customer services processes, cutting-edge technology offerings, alternative payment models, and ancillary healthcare services," Connor explains. "PMM is lowering patients' annual healthcare costs while simultaneously improving patient outcomes and government-regulated quality metrics."

PREMIER MEDICAL **MANAGEMENT**

Connor and his partners also focus on empowering their employees by incorporating Six Sigma-based business principals. "This helps to expand the practice while keeping it dynamic," he explains. In 2020, PMM applied the business principles within its two main subsidiaries—Centennial Medical Group (primary care) and First Call Medical Center (urgent care). The company's holistic approach keeps communities healthier via its employees, whom they help to grow a career in healthcare. Since their group is multi-specialty, PMM staff members are given opportunities to obtain multi-level positions.

Because the company values philanthropy, PMM created a scholarship program for employees who are interested in continuing their education. They also work with a number of charities that serve local communities. For example, the company supports the Ed Reed Foundation, a nonprofit founded by the Baltimore Ravens Hall of Fame safety, Ed Reed, by bringing health care services to inner city Baltimore. "At PMM, we believe that a profitable medical practice is a sustainable medical practice, which can serve the community's needs no matter the economic environment," says Connor.

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Alejandro Plascencia, PhD
Director and Project Manager

Business partners Alejandro Plascencia, PhD, and Larry Parker share a long history of success. Over the past 15 years, Alejandro has led and participated in a number of real estate ventures involving warehouses, new construction, and property renovation. He was purchasing director at GST—Mexico's largest global seat manufacturer—and has served as director and CEO of several other companies, including APB Virtus, Duenno, and Cuinba. Alejandro also founded Nocnïu Real Estate Brokerage as well as the health spa, Maoran.

Boasting over 20 years of executive experience in the real estate industry with 17 prior syndications, Larry perfectly complements Alejandro's skillset. He founded and operated a real estate investment company, a recruiting firm, and a home care company that expanded to include 17 offices nationwide. Larry also formed a business brokerage that worked with EB5 investors and has been published in Forbes Magazine. In acknowledgement of his contributions to the field, Mayor Kate Barnes of Kansas City, MO presented him with the *Real Estate Restoration Award*.

Today, the partners specialize in the sale of resort properties internationally and in the syndication of multifamily real estate and mobile home parks. They own and operate three companies: First Landmark International, Prospect Equity Partners, and Nocnïu Real Estate. Alejandro serves as their director and project manager, and Larry oversees the strategic planning, development, and application.

Larry Parker, Strategic Planning,
Development, and Application

Established in 2006, First Landmark International is a leading propriety acquisition company that specializes in property management, diversification of investor portfolios, propriety consultation, and rental asset management. With four offices located in CA, PA, FL, and Mexico, the team of brokers takes pride in representing international clients in pursuit of lucrative real estate as well as sound property management, consulting, and acquisition advice. They perform seamless market research ad respond to market trends in real-time.

Prospect Equity Partners is a real estate investment and syndication firm based in San Diego, CA. They provide long- and short-term appreciation—from equity investments to sophisticated accredited investors, institutions, and family offices. With the goal of becoming a national investment company, the firm specializes in real estate syndications in multifamily and mobile home parks. Real estate consultants provide a range of services including, due diligence, market studies, portfolio services, lease advisory, and more.

Located in Leon, Mexico, Nocnïu Real Estate offers comprehensive solutions to meet every client's real estate investment needs. The company's mission is to provide support and transparency throughout the investment process and to maintain a worldwide presence through buying and selling opportunities. "With the support of technology, our human resources, and transactions, our goal is to become an international company that includes its environment and society through successful transactions in the real estate industry," says Alejandro.

Larry is an alumnus of The University of California at Los Angeles where he graduated with a bachelor's degree. He then went on to enroll at The University of Southern California, where he earned a master's degree in public administration as well as a master's degree in urban planning and development. Larry is also a certified property inspector, certified fractional consultant, and a licensed Real Estate Broker in California, Florida, and Pennsylvania. Alejandro holds a PhD in project management from the University of Latin America, SC and a master's degree in finance and marketing from Tecnológico del Monterrey. He was also awarded a doctor honoris causa from The National Autonomous University of Mexico.

First Landmark International

PROSPECT EQUITY PARTNERS

Nocnïu BIENES RAÍCES

www.1stlandmark.com | www.prospectequitypartners.com | www.nocniu.com

Tanice “TK” Gonsalves

A serial entrepreneur with a string of successful ventures, Tanice Gonsalves, who goes by “TK,” is a seasoned pro in the field of federal contracting. In fact, it’s the acronym-heavy field she’s in that even inspired her nickname. She got her start in the business in 2005, and quickly learned the ropes. She was put into a number of different key positions, which added even more to her portfolio of knowledge, experience and network which opened many doors for her and others who she has mentored. After four years with her first company, she joined a billion-dollar firm as a business development executive, working for two years among active and retired high-ranking military personnel and focusing on the Department of Defense market. Working her way up the ranks, TK soon reached the C-levels and became a chief strategy officer.

Today, she’s president and part-owner of WTI alongside her business partner Cindy Ford, CEO of WTI, a women-owned, multimillion-dollar federal contracting firm specializing in providing services around information technology, AI, training, mission support, healthcare, cyber security, and data. TK commended her business partner, Cindy, for making WTI a solid start for continued growth and spoke about her strong partnership of trust and uniformity with Cindy. With “Everything Data” as is their motto, WTI provides information technology, artificial intelligence, healthcare, health IT, training and, of course, data services to federal government agencies, the Department of Defense (DOD), Health and Human Services (HHS), FEMA, U.S. Special Operations Command (USSOCOM) and others. Under TK’s guidance, WTI has expanded its footprint by more than 2,000 strategic partners and seven key clients over just the past three years and has grown to become one of the leading AI services companies for the federal government—with $4 billion in federal government contract vehicle ceiling awards, including a $950 million contract vehicle for USSOCOM.

As a leader of this fast-growing company, WTI, based in Fairfax, Virginia, TK covers all growth and strategy and has defined the vision and mission of the company as the president of WTI. She oversees all business development, capture, pricing, and proposals, as well as managing the advisory board, and is in charge of the development and execution of long-term strategies with the goal of increasing revenue and the company’s positioning in the federal market and staying abreast of the market landscape and industry developments. “I’ve developed a strong vision for the company,” she says. “We have a clear, successful path and have stayed true to the defined vision.” In addition, TK is also the CEO of TKMG, an advisory, consulting, and mentoring firm, as well as TesLoop, a startup mobile app and investment company, and Saint Rose Capital (SRC), a real estate investment company. She also founded Intelligence LLC (INTELLIGENCE), an Artificial Intelligence (AI) services firm for commercial and federal clients that was awarded a $50 million contract for the Health and Human Services Department.

TK credits her success to her creative, strategic, and out-of-the-box thinking, something she inherited from her mother and her sister, a successful entrepreneur and a renowned published poet, respectively, and something she hopes to pass on to her own daughter. “Watching my mom successfully manage five companies gave me my entrepreneurial mindset,” she says. TK also has the unique benefit of an international educational background, studying at an international academy in Jamaica before getting her master’s degree in international trade from Johnson and Wales University in Rhode Island, where she met her soulmate and now husband of 17 years. She is grateful for her husband as “he holds things down so I can soar for my family,” she says. “My family is my backbone for success. I want to leave a legacy for my daughter, so she knows that there is a secret sauce to success and that I provide her with all the ingredients of that sauce early in her life.”

TK helps set WTI apart from competitors not only through her honesty and passion, but also by never being afraid to take on big projects that other, smaller companies might shy away from. Her motto when it comes to bidding is “If you don’t bat, you don’t win,” and encourages her team to be similarly tenacious. TK is dedicated to not only providing top-notch service and support for clients, but also maintaining a high level of social responsibility with each project, as well as cultivating and maintaining client relationships. “I want to build strong relationships and never deviate from those relationships. I want clients to get the support we talk about in the proposal,” she says. “The execution of excellence is important, not just writing it on a piece of paper but delivering and delivering it big.” She’s also passionate about mentoring and empowering young adults to reach for their own dreams. “Anything you decide to do, you can do, and anything that you want, you can get,” she says. “If you don't try and aspire for it, then it will not happen.”

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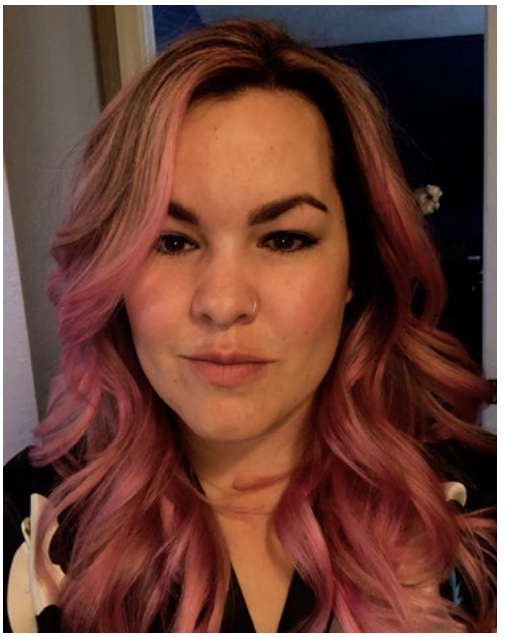

NICOLETTE LAROS

Nicolette Laros might not have started *On The Spot* (OTS) *Mobile Detailing*, but she is the one who catapulted it into being the successful business it is today. With a decade of business experience from a career that includes roles as a logistics and supply chain manager to director of operations, Nicolette, along with her husband Darren, took the leap in June of 2020 and rebuilt *OTS* from the ground-up, officially launching it in its current form in January of 2021. In just six months, they took it from a company with only one van and little reach, to a flourishing establishment that's doubled in size, serving roughly 200 customers a month in the greater Albuquerque area all the way to Santa Fe, with bookings extending a month or more in advance. Their growing customer base includes not only many repeat customers, but dealerships, auto body shops, insurance companies, and various New Mexico's fire department and ambulance systems—all clamoring for the exceptional services for which they've already become known.

On The Spot Mobile Detailing offers interior and exterior mobile detailing on all makes and models of vehicles, specializing in paint correction and ceramic coating. They also come to the customer's location for maximal convenience. "Our radius keeps expanding to meet the increased demand from word of mouth about our services," Nicolette says. "We're investing in additional vans and plan to develop a line of *On The Spot* products to keep up with demand and projecting growth to quadruple by mid-summer," she says. Nicolette attributes the growth to the incredible partnership she shares with her husband. "Our areas of expertise complement each other, from marketing to finances to the finer details. All the companies I've been with in the past have been small, growing companies, so I have the experience to draw from." But beyond her expertise is the true spirit of an entrepreneur who revels in running her own business. "Every single day it's something new and just growing by leaps and bounds."

ON THE SPOT AUTOMOTIVE DETAILING

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BRYCE DRYDEN

Compass Island

Bryce Dryden knows that the world can sometimes be a dangerous place, but he doesn't want to prevent people from exploring or working in it. He also knew, from leading a business development division working for an international situational awareness company, that the technology to track assets, monitor events, and manage a response existed. The issue was it was not making its way to the wider marketplace. That's why about four years ago, he and two partners started Compass Island LLC, in Charleston, South Carolina. Compass Island took the tracking and global intelligence technology available and built a product specifically for the international business travel market. Through integrations to global intelligence data, travel systems for passive itinerary tracking, and active tracking through phone apps and over 100 tracking devices - companies and security personnel get true context on risk exposure, safety, and operations. Today, Compass Island's technology is utilized globally and is the centerpiece for some of the most advanced private operations centers.

Their approach to the technology allows it to be tailored for their clients' needs, taking an individualized, entrepreneurial approach. This includes multiple Fortune 500 companies looking to track their employees and manage their risk as they travel and get access to a complete situational awareness and event management system. By being aware of upcoming or ongoing issues, they can manage the safety of their people and their global operations.

Bryce's company exists because he wanted to find other applications for technology that already existed and use it to benefit businesses and organizations. In fact, while working with a government contractor, he was put in charge of finding new uses for the technology, and Compass Island was the result of that endeavor. "For me, it is the ability to take a solution already out there and apply it to something completely different, a niche, or a problem that someone hasn't solved," he says. "The company has really embodied this idea of finding unique creative solutions that drive value and don't require a massive team of developers." He and his team are continuing to advance and deepen the Compass Island product set.

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SERGEI GUK

For 19 years, Sergei Guk has been on the front lines of the restoration industry providing services for buildings damaged by disaster and accident. He has crafted expertise through both on the job experience and a litany of professional certifications including IICRC, The Asbestos Institute, the EPA, and BioCleaning Services of America, Inc., among others. With features on *Channel 5 News* in Phoenix, *SHOPTALK360*, and the *Phoenix Business Journal*, Sergei is a leading voice in his field. He continues to educate the community by regularly serving as a guest speaker and panelist at industry events such as BOMA, IFMA (International Facility Managers Association) and MARC Community Resources, Inc.

In 2014, after an impressive career that includes growing a similar company from $120,000 a year in sales to over $4 million, Sergei turned the industry on its head with the launch of Phoenix-based, RestorationHQ, a commercial restoration firm that focuses on working on behalf of clients rather than insurance agencies. The company provides top-notch restoration, remediation, mitigation, and abatement services, with technical expertise and a commitment to proactive communication. Staff are friendly, understanding, and anticipatory of clients' needs, as they guide them through a stressful and difficult time. "We changed the experience of the customer as it relates to restoration work and we're disruptive to the normal industry, which aligns itself with insurance companies, not the clients they serve," Sergei explains. "RestorationHQ was born out of the pains and struggles I saw clients going through my entire career. I created this business to help eliminate those pain points. It is time to pioneer a better new way." For seven years, Sergei has done just that.

Now, with over 41 million square feet under contract and a sole focus on commercial and industrial properties, RestorationHQ prides itself for working seamlessly alongside property management companies, general contractors, mechanical trades, facility management teams and subcontractors -counting among its clients CBRE, Cushman & Wakefield, Transwestern and many more others. With his sights set on the national stage, 2021 kicks off the initiation of a three-year expansion plan, beginning with test markets in different parts of Arizona. "We will choose our test markets based on how they represent similar challenges that could be encountered in other states. This will allow us to analyze and revise our model to ensure the successful launch to other regions," he explains.

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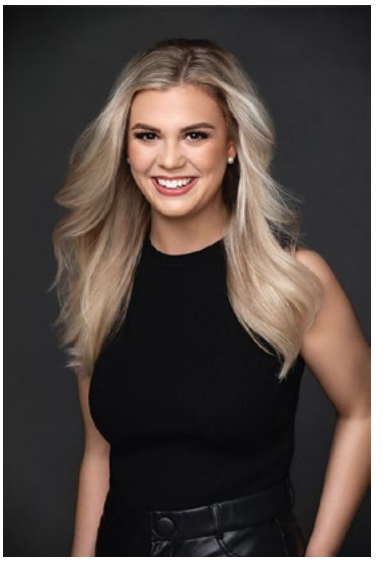
SYDNEY PHILLIPS



By the time Sydney Phillips was just 22 years old, she had already built and founded five successful companies in finance, tech, and real estate. A serial entrepreneur on a mission to push humanity forward, Sydney has seven years' experience in commercial real estate and as an investor and developer in multifamily, retail, office, and hotel properties. Today, she leads a commercial real estate conglomerate, with three firms focused on investment and development. In 2019, she founded Daring Greatly, supporting women, LGBTQIA+, and minority business founders, and she regularly speaks all over the U.S. to and for women in STEM leadership. In June 2020, Sydney embarked on her latest business, Zukurri, as founder and CEO. Zukurri creates interactive visualizations for real estate that enable buyers, brokers, investors, and communities to imagine real estate possibilities. "By leveraging augmented and virtual reality, we visualize and experience unbuilt spaces to plan, design, communicate and market," Sydney explains. Headquartered in Austin, Texas, Zukurri's clients include commercial real estate developers, architects, and homebuilders across the country. For her real estate work as well as her development of Zukurri, Sydney won the 2020 *Young Female Entrepreneur of the Year* Award and was named among the *Top 25 Most Influential Women in Commercial Real Estate*.

Zukurri was inspired by Sydney's own frustration with the lack of speed she found in the real estate industry. She soon realized this was due to lack of visualization. Using AR and VR to facilitate planning, design, and communication, Zukurri's proprietary software, which clients can download to their phones and computers, can be scaled to imagine homes and neighborhoods, or whole communities and cities. It turns blueprints into 3D interactive experiences, with an emphasis on breathtaking realism for better planning, risk mitigation, and design, as well as better communicating ideas to multiple parties. One day, Sydney hopes this software can be even used to plan communities on other planets. In addition to changing the face of real estate and design planning with Zukurri, Sydney is also host of her own podcast, *The Sydney Phillips Podcast*, and an author, keynote speaker, and amateur race car driver. Considering herself a futurist, she's also a member of the Mars Society and the Singularity University. She holds a BA from Texas Christian University.

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DR. NATHANIEL HOWARD

When Dr. Nathaniel Howard was 10, he was first introduced to the Rocky Mountains. They'd been in his backyard the whole time, as a native of Colorado, but it was through a YMCA program that he first got to experience their true majesty. That visit inspired not only his love of nature and the outdoors, but also his love of science and ecology.

Today, Nathaniel has enjoyed more than 30 years as a scientist, adjunct professor, teacher, head coach, principal, government-appointed Quality Teachers Commission member, and published author. In 2019, he joined the Lincoln Hills Care Foundation as president and CEO, which supports the Lincoln Hills Cares Organization through fundraising and program design. Nathaniel directs the management and operation of Lincoln Hills Cares Foundation, as well as driving the branding. Headquartered in Denver, Colorado, the Lincoln Hills Cares Organization provides Environmental STEM (E-STEM) courses in the Rocky Mountains for city-dwelling youth. He developed the E-STEM programming that Lincoln Hills Cares Organization now offers. "Our programs empower youth who may not otherwise have the opportunity due to economic, social, or family circumstances," he says. "If they actually see the environment and learn about the green jobs and other careers that are a part of this, they will be able to take part in that with careers in the future."

"Exposure is key," he explains. "You have to expose young people to the possibilities. Some might find it by chance, but most of the time, it's because somebody introduced them to it. Environmental STEM careers are the future, but there's a lack of women and people of color in this field due to lack of exposure. If you introduce them to these things, the ROI is high. Programs like this work." The thought that his program is actively helping not only young people find inspiration and direction, but also contributing to a more sustainable and environmentally responsible future is what keeps Nathaniel going. "What drives me is the potential, the future. If I can make a difference in at least one of our children's lives, that's what drives me, and the idea that that child will influence another and another in the future."

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SOPHIA FELIX

Award-winning entrepreneur, Sophia Felix, holds extensive experience in talent management, business development, and cannabis public relations. She got her start as a subcontractor for the Department of Defense, where she managed government contracts for 14 years before winning a scholarship to the *Emerging Latina Entrepreneur Fellowship Program*. After receiving training for international trade and business development, Sophia pursued her dream of business ownership. In 2014, she founded HBM Talent & Management, a boutique model and talent management agency. Then, in 2020, she co-founded the International Cannabis Business Women's Association (ICBWA), a Los Angeles-based nonprofit, dedicated to the education and growth of female leaders within the cannabis industry. As CEO at HBM, Sophia is highly selective when choosing her clients. They range from high-net worth to small business owners based in Los Angeles, Las Vegas, New York, Canada, UK, and Switzerland. Serving as each client's brand expert, consultant, publicist, and business manager, Sophia is on call 24/7.

Sophia is also president of ICBWA. While working as a public relations spokesperson for YM CBD, she and a fellow businesswoman discovered a gap for women in the cannabis industry and gathered board members from across the country and South America to provide women with education and advocacy. Sophia is responsible for overseeing ICBWA's business accelerator program, funding, and daily operations. A devout philanthropist, Sophia dedicates 10% of her revenue to charity and requires every HBM client to volunteer for two charitable events per year. She is also president of the Southern California chapter for America's Children of Fallen Heroes and has dedicated 10 years to Passion 4 K.I.D.S.—working directly with Izaiah Wallis, a child victim of a drunk driver. In acknowledgement of her generosity, Sophia has received numerous honors, including *ABC 10News Leadership Award*, *Hometown Hero*, *California Hero,* and *Telly Award.* She also received an honorable mention in *Latina Style Magazine* and was nominated for *Corporate Latina Executive of the Year*, *Rising Star,* and *Inspirational Woman of the Year*.

HBM TALENT & MGMT

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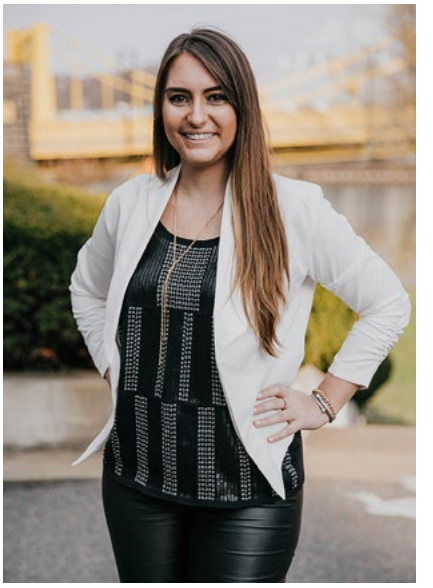
TIFFANY B. CONTIC



Tiffany B. Contic was enjoying her seventh year as a successful interior designer when, like millions of others during the pandemic, she found herself laid off in October 2020. What some might see as misfortune, Tiffany saw as an opportunity to follow her passion as an entrepreneur, leader, and designer. She took all the experience she'd gained working with small design-oriented companies and started 7Tier Design Studio, her own interior design firm. And while 7Tier Design Studio might be a relatively new company, Tiffany hit the ground running with a growing number of projects in her Pittsburgh locale and remotely for clients across the U.S. From programming to design documentation, 7Tier specializes in hospitality, multi-family, corporate, and residential design. Tiffany's considerable background in design and architecture has earned significant recognition, including honorable mentions from the American Institute of Architects (AIA) and the International Interior Design Association (IIDA), which also allows for her to work with clients farther afield.

Tiffany's background is steeped in the arts, as well as in marketing, making her truly cut out for heading a design firm. While receiving her B.A. in interior design at Kent State University, she studied abroad in Florence, Italy, which impacted her cultural and architectural senses and carries through to her projects today. After interning with an architectural firm, she later branched into the residential sector and the hospitality industry, designing for hotels all over the country and completing more than 20 projects in her career. For Tiffany, simply creating and completing designs is not enough. She wants to create spaces that inspire her clients, peers, and other professionals in the industry. "Every project and client are different, so the process varies," she says. With deep value placed on the design process, she ensures that each project has the structure and organization to keep moving along. "I put most of my effort into concept design. This is what sets my designs apart," she says. "Every design should have a story to tell and embody a deeper meaning. I want my clients to be happy above all else." This attention to detail, function, and a deeper connection between design and client is captured in 7Tier's motto: "Igniting inspiration one tier at a time."

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TIFFANY GRANDCHAMP

Tiffany Grandchamp has dedicated her life to helping and empowering others and has loved every moment of it. With 20 years of experience in health and human services, Tiffany founded Women Lifting Women in 2020 in St. Paul, Minnesota, as a consulting firm focused on services to support female leaders, both established and emerging. Launched in November 2020, Women Lifting Women offers services to anyone identifying as a woman and aims to remove barriers for women entering and excelling in the workforce. The organization focuses on collaboration and partnership between women and women-owned businesses, as well as developing skill sets, work plans, and behavioral and technical skills. "I use all the experiences I've had as a leader and my understanding of the challenges that women face, to help them reach their greatest potential," Tiffany says. "We are the go-to resource for women leaders, forming lasting relationships and supporting women for the long haul."

Focused on lifting women in the workplace through training, leadership support, and targeted consultancy, Women Lifting Women offers seminars, workshops, leadership development training, customized consulting, and much more, including dreams of a new community engagement initiative. "Women are doers," Tiffany says, "but we still cling to this identity that we have to do everything, instead of focusing on leading. Being humble is great, but women need to take credit for what they do and have the confidence to sell themselves. We're helping to shift that mindset, break those molds." Tiffany's commitment to lifting others has been at the center of her entire career. Not only is she the chief operating officer for a nonprofit mental health agency in the Twin Cities and the founder and CEO of Women Lifting Women, but her implementation design work won the *2017 Colleen J Goode Research into Practice Award* at the National Evidence Based Practice Conference. "Through my organization, I get to spend time living out a dream that I have been envisioning for almost a decade, and I get to work with incredibly talented women. Every day of my life is spent serving others and trying to make the world a better place. I love it!" In addition to both a bachelor's and master's in organizational and strategic leadership with a focus on global studies and crisis management, Tiffany is a certified non-profit accounting professional, and is certified in LEAN and project management.

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GARY GEISER

Nearly 25 years ago, Gary Geiser made a purchase that would attract tens of thousands of Colorado's most avid foodies. Known as King's Chef Diner, the small 13-seat Colorado Springs restaurant was a historical landmark, built in 1956. It ran successfully for over 40 years, and when Gary purchased it in 1997, he redesigned the menu items, and business grew from there, with a second location opened in 2008, features on the *Food Network* and CBS's *Roker on the Road*, and the award for *Best Diner in America*. The diner's most famous specialty item—Colorado Green Chili Sauce—exploded with the start of its Whole Foods program in 2007. Since the product's launch, King's Chef has sold more than 400,000 jars, making it one of the most popular green chili brands in the world. The sauce is currently sold on Amazon, carried in over 300 grocery stores, and distributed throughout nine states—in Whole Foods, Natural Grocers, King Soopers, among others. On the heels of the product's success, Gary launched the country's first—and widely popular—non-GMO-project green chili sauce.

Handcrafted with Colorado green chili peppers, the sauce is always vegan, gluten-free, and non-GMO project verified. Both sauces are produced by hand via the small batch process, and to the delight of consumers, they're completely shelf stable. "We work with small farmers with small lots to produce really flavorful fruit, and this is what we're known for," says Gary. To meet growing consumer demand, King's Chef opened its own FDA and USDA licensed manufacturing arm in 2014. The 15,000 square-foot facility produces Colorado Green Chili sauce and salsa as well as potato chips. They also co-pack private-label products for supermarkets and provide bulk amounts of green chilis to other manufacturers. "When I go into grocery stores, nothing pleases me more than seeing one of our items in someone's basket or watching a shopper take one off the shelf," says Gary. "I truly enjoy bridging the food manufacturing and restaurant sides, but what really drives me is the happiness of consumers."

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DR. JERAHN "J.D." HYMAN

When Press Play Podcasts first got its start in 2018, its sole focus was sports. But that was before Jerahn "J.D." Hyman started on as chief operating officer in August 2020. When Dr. Hyman joined, Press Play's CEO, Chase, saw an opportunity for the company to expand, and soon they were adding different aspects outside of sports to increase listenership. Though he's only been handling Press Play's daily operations, including finance and budget, marketing strategies, contracts, and intern management for less than a year, Dr. Hyman has already grown the network by more than 600% in just three months. He also played an integral role in bringing in the company's first investor and made it the fastest growing podcast network in the Midwest. Though Dr. Hyman hails from Columbia, South Carolina, Press Play is centered in Ohio, home to several of Cleveland's well-known sports radio and TV voices.

Today, Press Play hosts 13 shows and plans to bring on several more this year. While they still offer sports shows, their horizons have broadened to include a host of others, including shows about what's new in streaming media, producing television and film from an Asian-American perspective, and the medical benefits of THC and CBD. They also host Dr. Hyman's own podcast (*The Hyman Podcast*), which focuses on difficult conversations about race, society, and culture. Press Play has a unique process for selecting shows, which involves working with prospective hosts every step of the way, making sure they have all the tools and skills they need to be successful. "Our approach focuses on the host being successful, so the first priority is not necessarily the content of the podcast, but rather the ability of the host," Dr. Hyman says. Dr. Hyman has a strong business background, with a BA in business management, an MBA in business administration, and a doctorate in applied sciences in international business administration. He's worked for Ohio's Department of Taxation teaching and training auditors, as well as the Ohio Department of Education managing their $450 million special education budget. After moving to South Carolina, he became assistant business manager at Wellpath, a private healthcare company, where he focuses on building policy and procedure and streamlining processes and business practices. Dr. Hyman plans for use his research to consult other businesses on reducing turnover, which is what his doctoral dissertation covered, in addition to serving as COO of Press Play and hosting his own podcast.

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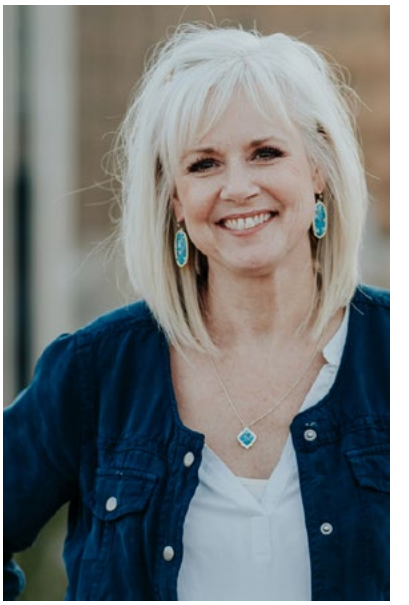
TRACY CONRAD



"It never even occurred to me to own my own business," Tracy Conrad remembers. A 25-year veteran of finance, operations, HR, and client services with companies ranging from startups and nonprofits to Fortune 500 firms, Tracy was suddenly faced with joblessness after her firm downsized drastically during the COVID-19 pandemic. But not for long. "I called people in my network. Within two weeks, I was fully loaded with clients, and it just kept growing." Along with her co-founder, she officially launched RadVine Consulting in Edmond, Oklahoma in August 2020. Though it's been less than a year, Tracy has already been named one of the *50 Women Making a Difference* in Oklahoma for 2020.

RadVine focuses on serving companies large enough to have C-level needs, but that may not be able to hire all those positions. "We come in as fractional experts in various roles to fill their top-level leadership needs without having the burden of salary and benefits of an employee," Tracy says. Specializing in nonprofit, startup and SMB companies, Tracy and her team perform the tasks of the C-suite, from COO to CMO to CAO, but at a fraction of the cost to the company. It's this combination of expertise and budget-friendly options that has earned RadVine a steady growth in clients from across the U.S.

Tracy consults in areas of administration, finance, and operations, and mentors leaders to help them achieve their goals, implement plans, and develop a leadership style that best suits the company culture. "My role in the organizations I work with is to lighten the load of the senior leaders," she explains. With a special empathy for her kindred entrepreneurs and startup leaders, Tracy works alongside her clients to build long-term, sustainable solutions tailored to the company's needs, all designed to help them meet their goals. "All the companies I've worked with have grown, and I think that's pretty cool. It's very exciting."

RADVINE CONSULTING

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ERIC GUNNET

For Eric Gunnet and his top-tier team at York, Pennsylvania's home-buying company First Capital Home Solutions, honesty and integrity is a top priority. Though revenue has been abundant over the course of Eric's 20-year career, having purchased upwards of 500 homes, the company he set in motion in January 2020 has loftier goals in mind. "We started the company after witnessing many local people being taken advantage of by real estate investors," Eric explains. "We wanted to ensure that when someone needs help, they get it without exploitation. It's a great way for us to invest in real estate and give back to the people in our community."

In pursuit of Eric's mission, First Capital Home Solutions offers homeowners three options: quick sale, fix and list, or traditional listing. Regardless of the route the client chooses to pursue, for Eric, the process is a rewarding one. He beams, "I enjoy seeing the final product—the houses are rehabbed, the neighborhood and community is improved, all because of the work we do."

Eric's background as a serial entrepreneur with a history of building tremendously fruitful ventures greatly aids in his overwhelmingly successful pioneering of First Capital Home Solutions. As a result of having served his community of York County for several decades, Eric is now able to lead the company to effectively assist in purchasing local homes, with the intent of maintaining what he describes as a "small-town" business mindset. "We want to help our neighbors in any way we can." Eric asserts. As a born-and-raised resident of the area, Eric's ability to relate to clients on a deeper level comes naturally. Many of his encounters present a difficult financial situation or circumstance, yet his background and approachable nature urges people to open up about these issues so that Eric can help them to overcome and conquer the situation in a way that is most beneficial to them. "We're not just profit focused," Eric states, "We're people focused. We've missed projected margins and revenue on some of our deals, all in the service of helping someone in the community."

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DAVID ARENA

David Arena is the CEO and founder of Alcove Media Company, a Philadelphia-based real estate media and photography company that provides high-quality digital photography, video, virtual tours, virtual staging, and other digital media for agents, realtors, and home owners in the area, helping them sell their properties faster by helping them look their absolute best. After working in the trenches as a real estate agent, six years ago, David used this insight to launch a company that gives people the most critical tool with which to sell their homes—gorgeous visual depictions that capture not only the amenities of a property, but the lifestyle that it invites. Today, David and his team photograph about 1,000 homes every month, with much of their work splashed across popular sites like Zillow. With astounding growth of 40% each year since its founding—without marketing—Alcove has been named the best Philadelphia real estate photography company five years in a row, and David himself has been named best real estate photographer in Philadelphia, as well.

David, a military veteran, founded Alcove in 2015 after first wading into the photography field the year prior, when he was working as a real estate agent. He saw that digital media like photography and virtual tours, then a new marketing angle, was a real need in the Philadelphia market. Without any experience behind the camera, David set out to teach himself photography. He borrowed a friend's camera and discovered that he not only enjoyed photography, but had a knack for it, and noticed that by simply taking photos of every property, he started selling homes faster. Soon, photography became the full focus of his business. He pivoted to a purely photographic role, began hiring team members, and launched what is now a thriving, award-winning company. David attributes the success of Alcove to the talent and dedication of his team of photographers and editors and their tight focus on real estate. "We're a photography company at heart that focuses on real estate," he says. "We hire great people who stay with us, and we create a place where people want to work and just have a lot of fun."

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TIM DWYER

Tim Dwyer is a true brand builder, innovator, and sales leader in the beverage industry. After working for 20 years in sales and marketing for some of the largest beverage companies in North America—Pepsi, Vita Coco, and Red Bull—he joined Flow Alkaline Mineral Spring Water in 2019 as chief revenue officer. Since his start, he's helped the brand become established in more than 20,000 locations throughout North America, including Walmart, Target, Costco, Wegmans, Publix as well as driving new distribution in Food Service accounts and new partnerships like Soul Cycle making Flow the exclusive water. Flow Alkaline Mineral Spring Water has been featured in Forbes, Vogue, Goop, and Fast Company as well as recently listed on the Toronto Stock Exchange in July 2021.

Dwyer is a popular and well-respected sales veteran who has strong working relationships with not only the top beverage distributors in the US, but with the retail buyers that build beverage brands today: from natural specialty, to regional and national grocery, to full format retailers, to club and convenience stores, as well as key food service retailers. He understands the corporate and franchisee dynamics, and the consumer demands and shopping habits that are shaping retail. Dwyer is skilled at building nationally recognized beverage brands in all retail environments and economic climates.

About Flow: Flow is a premium alkaline mineral spring water company with a diversified line of health and wellness-oriented beverage products sold online and at retailers throughout North America. Due to its unique artesian spring sources, Flow products contain naturally occurring electrolytes and essential minerals, and its original and flavored water products have an alkaline pH. As part of its ongoing innovation into functional "better-for-you" beverages, Flow recently introduced a new line of collagen-infused waters with natural flavors. Founded in 2014 by serial, mission-driven entrepreneur Nicholas Reichenbach, Flow is highly dedicated to sustainability and is a B-Corp Certified company with a purpose to "bring wellness to the world through the positive power of water." Flow set out to be a sustainable brand, packaging its products in up to 75% renewable-resource-based Tetra Pak™ cartons utilizing sustainable operations.

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KAREN BALLOU

Karen Ballou knows how to combine her love for skin care and beauty with some seriously impressive investment strategies. Karen is the founder and CEO of Immunocologie, a first of its kind skin care brand truly devoted to the mission of creating 'healthy skin.' The brand uses natural ingredients that work with the skin's microbiome and immuno-protection system. Meanwhile, Karen and her husband are also founders of the growth equity firm, LB Equity, based in New York City, investing in emerging brands in the wellness, beauty and personal care space. Since 2013, the firm has invested in more than a dozen brands in addition to Immunocologie. Karen and LB Equity are committed to building 'brands with a mission,' True to this conviction, Karen sources ingredients for Immunocologie directly from female producers in Africa, with whom she works closely. She also works with one of the world's leading botanists to create skincare products that are truly distinct and of the highest efficacy. As Karen says, "To me, it's about creating the most incredible brand ever.".

Karen has been in the beauty industry since the start of her career, working with giants like Elizabeth Arden and Redken before taking the plunge into entrepreneurship. With a desire to develop a deep understanding of the skin and how it behaves, she also decided not only to earn an esthetician's license, but also founded the organization, Aesthetic America and opened her own spas in Atlanta, Chicago and Connecticut. With her expertise in formulation and skin science, she has been involved in the development of more than 65 products during the course of her career. However, after successfully battling cancer, Karen took another step forward, creating her own brand and utilizing some of the insights and ingredients that helped her combat her illness. Saving the best for last, Karen is thrilled by the success of Immunocologie and the impact it is having for so many women, and men, too, across the world. "I want to be a brand that stays around forever," Karen says. In addition to managing her company, equity firm, and brands, Karen is also in the process of writing a book about the beauty industry and her journey within it.

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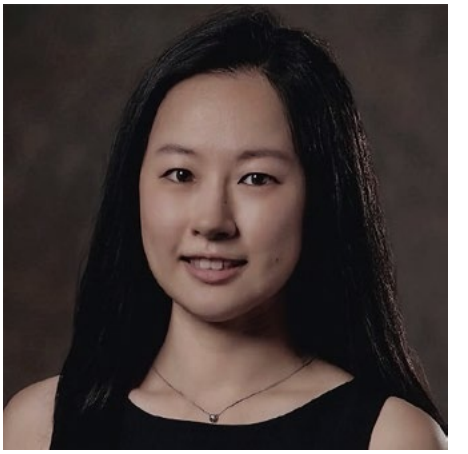
JIAYI "KRISTY" XU



Jiayi "Kristy" Xu had been in the financial services field for eight years, including working as a licensed financial advisor at Raymond James, when she decided to jump into a new opportunity. In July 2019, after receiving her MBA degree from Carnegie Mellon's Tepper School of Business, she co-founded BizCatcher International, Inc., a machine learning-powered M&A platform that connects small and middle market business buyers and business sellers. BizCatcher International platform system connects companies based on analysis of their compatibility and goals. Buyers and sellers enter their information, and the platform system analyzes the information and matches them with each other based on the suitability level.

Kristy oversees the development and operation of the platform, markets the platform to potential clients, and ensures that BizCatcher International is providing the best possible service to current clients. Today, BizCatcher International has some 200 users and 6,000 businesses for sale in the platform and is currently working on opening a second physical location in California's Bay Area, as well as expanding their presence in China. BizCatcher is specialized in cross-border transaction opportunities between U.S. and China, helping buyers and sellers identify deal opportunities and facilitating acquisitions and sales. They also partner with trusted local professionals to help new businesses enter the market. "We have a great network with potential Chinese business buyers in several industries," Kristy says.

For Kristy, the best part of her job is helping both buyers and sellers achieve their business goals, whether it's a buyer looking to expand into different industries and locations, or a seller looking to smoothly exit their businesses. And she also gets to work with a number of other professionals who help facilitate the transactions. "I love working together with professionals who have different specializations to better serve our clients," she says.

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HONORABLE MENTION

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