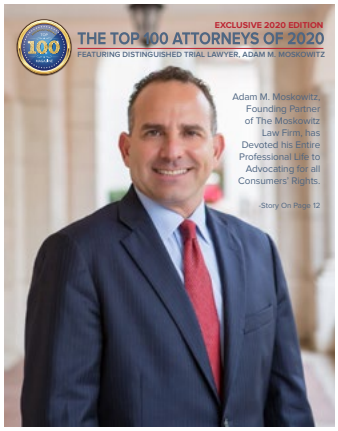
THE TOP 100 U.S. BUSINESS LEADERS

FEATURING MIKE & JAIME KLUMPP

Meet the Power Couple of the Hemp Industry.

-Story on Page 4

THE TOP 100 MAGAZINE



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*.

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THE TOP 100 U.S. BUSINESS LEADERS

WHO'S INSIDE

Mike & Jaime Klumpp

Meet the Power Couple of the Hemp Industry—Leading the Industry Across the Plains of Michigan to the Shores of Switzerland & Beyond

> Everything we do is geared toward helping our customers build profitable ventures—agricultural consultation, drying, extraction, processing, supply, and we also purchase hemp crops.

From farm kid to the leader of the largest hemp processor in the state of Michigan with a global reach that spans across both ponds, Mike Klumpp, along with his wife, Jaime, presides over a family empire that is changing the landscape of a booming industry. The Klumpp family has been an integral part of the agricultural fabric of Central Michigan for generations, since Mike's great-great grandfather planted his first crops on the countryside of Isabella County some 145 years ago. Growing up, Mike reveled in these vast farmlands and the scent of newly tilled soil, the energy-filled air of harvest season—but he was also a forward-thinking entrepreneur with an eye on the horizon.

Today, he and Jaime, who serves as CFO of all their operations, own a thriving 3,000-acre organic farming operation, MAK Enterprises, and Ag Marvels, a full-service hemp company with the largest state-of-the-art processing and extraction facility in the state, serving some of the biggest processors and manufacturers of CBD-based products across the globe—all while selling hundreds of kilos of cannabinoid products per month. As a member of the U.S. Department of Agriculture's Foreign Trade Advisory Committee, and a member of Michigan Farm Bureau Hemp Task Force, Mike's standing as a leader in the agricultural industry—and his commitment to advancement of the industry as a whole—is unquestionable.

Indeed, if ever there were two symbiotic entrepreneurs who know what it takes to build a thriving enterprise, it's Jaime and Mike—the veritable matriarch and patriarch of hemp. Jaime hails from a successful career in real estate, from design to building to property development, and blends her creative talents and business skills in her roles not only at Ag Marvels and MAK Enterprises, but her own specialty farm and CBD company, Heirloom Grove, a bath and body skincare brand that is taking the market by storm.

In this special four-page series, we spoke with Mike and Jaime to learn more about their growing dynasty and their responsibilities as the vanguards of an entire industry.

Mike, give us a glimpse of your journey from hemp farmers to global suppliers in just two and a half years.

Jaime and I have always been entrepreneurs with a focus on the ag industry. When hemp became legalized in 2019, it seemed the perfect fit for us. It's not often you have an opportunity to be one of the founders of a new industry, so we jumped in with both feet. Shortly after planting our first hemp plots on our own farm, MAK Enterprises, we installed a biomass dryer at Ag Marvels, followed by our first state-of-the-art processing plant to extract CBD and other isolates. As

demand grew, we grew with it, constantly expanding to fit the changing needs of the market. Now we're working with nearly 100 farmers across the country, processing hundreds of thousands of pounds of hemp, and supplying products and services to hemp growers, product manufacturers, bulk buyers, and overseas customers. Our second extraction facility will quadruple capacity. We've also expanded with our own retail brand, Heirloom Grove, Jaime's company.

> We're helping to change the message and the culture around hemp, normalize it, and help people understand it's tremendous health and environmental benefits, and consumers are understanding this now.

Tell us a bit more about Ag Marvels and MAK Enterprises.

Ag Marvels is a fully integrated, full-service hemp company providing a complete line of agricultural resources. As you mentioned, we have the largest hemp processing and extraction facility in Michigan, but we also specialize in cannabinoid conversions and manufacturing of wholesale and retail finished products while marketing and brokering hemp material and products. Everything we do is geared toward helping our customers build profitable ventures—agricultural consultation, drying, extraction, processing, supply, and we also purchase hemp crops. MAK Enterprises is our 3,000-acre farming operation, with two-thirds dedicated to certified organic farmland, and we added about 60 acres of organic hemp, from which we extract the CBD that we use in Jaime's Heirloom Grove products.

Ag Marvels now counts companies in several countries among its clients. What prompted this global expansion?

We already had a more global model in place, which really sets us apart as few U.S. companies sell outside our borders. As other countries were legalizing hemp and CBD, we saw an opportunity to expand beyond the domestic market, so we started building connections overseas to sell products there. We're experts in exportation of these products, and the needs of businesses in a lot of these countries revolve around the shipment of these products—transit, customs, duties, tariffs, regulations. We make the transaction a smooth one for our customers abroad when they source products from us.

Jaime, we're going to talk with you about Heirloom Grove in a moment, but first, will you tell us about yours and Mike's efforts to educate the public about hemp and CBD?

When we first got into the industry, many people were hesitant to adopt it because they thought that hemp was the same thing as marijuana. But it's entirely different—it's for health, *not* the high. We're helping to change the message and the culture around it, normalize it, and help people understand it's tremendous health and environmental benefits, and consumers are understanding this now.

Finally, Mike, will you give us a glimpse into your ongoing work to advance *all* players in the industry on a global landscape, and the industry as a whole?

I'll be happy to. Ag Marvels being fully integrated and vertical in the hemp industry gives us unique experience, knowledge, networking opportunities, and resources to be a top leader in the country. And we use our position to generate real hemp solutions to advance not only our company, but the hemp industry in the U.S. as a whole. I was also recently appointed to the U.S. Department of Agriculture's Foreign Trade Advisory Committee for my leadership and experience in hemp, as the U.S. government looks to explore export opportunities in the global market. The future is bright for this market, and it's very important that we begin to include hemp in discussions for foreign trade as we move forward and grow this industry.

Thank you for both for sitting down together to talk with us. Now, let's turn to our conversation with Jaime to learn more about her and her company, Heirloom Grove.

She is the CFO of a family-owned hemp empire who is changing the face of CBD—literally. One need only glance at the family photos adorning the Heirloom Grove website to understand how Jaime Klumpp is capturing the hearts and minds of CBD consumers and wholesalers across her home state of Michigan and the globe. She's a new breed of leader, bringing fresh light to the space and changing lives the world over.

A creative businesses woman with a passion for entrepreneurship, Jaime possesses a talent for turning ideas into successful businesses, from designing and building homes to property development and real estate ventures. It is precisely this rare blend of creative and business skills combined with a design background that she brings to her roles as the CFO of her and her husband, Mike's, thriving hemp dynasty, including Ag Marvels, and MAK Enterprises, their sprawling 3,000-acre family farm. So when Jaime launched Heirloom Grove in 2019 and in less than three years tripled its product line and earned a reputation for excellence within the hemp and CBD community, it came as no surprise to anyone. Heirloom Grove is a specialty farm and seed-to-shelf CBD line derived from their family farm, where they grow industrial hemp and multiple other specialty crops including varieties of sunflowers, a newly planted fruit tree orchard, and blueberry fields. To be sure, Jaime owns the business savvy, talent, and all the skills necessary to run this dynamic empire, but underlying it all is a kind-hearted nurturer motivated not by success, but by family and community.

Jaime sat down with us to share more about Heirloom Grove and her mission to help women and families live healthier, happier, more beautiful lives.

Let's jump right in, Jaime. Tells us a little bit more about Heirloom Grove and your products.

I'd love to. Heirloom Grove is founded on farm-to-family ideals, and our products originate from our own organic farm, with the highest-quality natural ingredients. We offer four lines—bath and body, our "From the Farm" plant seeds from our own acres of sunflowers, our gift sets, and our relief products that can naturally support an array of health benefits. Our entire line is available via our website and in local specialty stores across Michigan, such as Craft Hemp Company. As demand is growing, we're working with distributors to expand into retail chains across the country, salons, and privately owned boutiques.

Where did the idea for a CBD company that caters to families and women come from?

When we got into hemp industry in 2019, I saw that women, especially, were hesitant about trying CBD, and I really wanted to change this. Ours does not look like the typical CBD brand that most people see in the market. CBD is not THC, and it doesn't get people high—that's not what we're about. Women were missing the benefits of CBD because of this misconception, so I started our own product line tailored toward them with a brand that reflects health and self-care, with a family feel. The company took off from there.

A creative businesses woman with a passion for entrepreneurship, Jaime possesses a talent for turning ideas into successful businesses, from designing and building homes to property development and real estate ventures.

Heirloom Grove

AGMARVELS
REVOLUTIONIZING THE HEMP INDUSTRY WITH INNOVATIVE SOLUTIONS

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Heirloom Grove is founded on farm-to-family ideals, and our products originate from our own organic farm, with the highest-quality natural ingredients.

Your kids have absorbed yours and Mike's entrepreneurial fire, with successful ventures of their own, including your wildly popular *Tell Me Anything Shared Journal for Mom and Daughter*. Will you share some of their endeavors with us?

I'll be more than happy to! All our kids have such creative spirits and brilliant minds—and they're still teenagers. I try to teach them, through example, the results of hard work, determination, and believing in oneself. I've advised my son with his successful farm-to-table farmers market, and my three daughters and I authoring our *Tell Me Anything Shared Journal for Mom and Daughter*, which has developed into a full e-commerce stationery and gift brand for women and girls, called Kai Kai Brai, named after my daughters. It started as an interactive journal for me and my girls, writing back and forth to each other, and we'd leave it on each other's pillow to read—whether a picture they drew, or fun ideas to do together, memories, or questions about more complex life things. In 2015, we began offering them to people worldwide. Counseling centers have given them to girls experiencing trauma, and we've heard such touching stories about how it has impacted hundreds of others' lives here in the United States and as far away as Australia, England, and South Africa, to Canada and Spain. Since then, we've expanded our line with notepads, cards, and tote bags that are available on our website, Etsy, and Amazon.

Let's end with a personal question. What is it that drives you, Jaime?

My family motivates me every day, seeing them happy and fulfilled. You know that what you're doing is not just an entrepreneurial venture, that what you're doing is helping people in some way—this gives me the motivation to keep doing it.

Robert

Chairman CEO

Outsourcing IT needs to Source 1 comes with incredible benefits.

Q & A

There's an intrinsic relationship between sports and business. It is parallel where a perfect balance of synergy and sagacity exist, but to capitalize on this utopian position requires a rare combination of finesse and discipline. This is where Robert Hessel shines.

Robert is chairman and CEO of Source 1 Solutions, an IT solutions and managed service provider headquartered in Clearwater, Florida, with additional offices in Ireland and the UK. Under his direction, the organization provides network operations in 118 countries with full-time employees in 17 countries. Utilizing nearly three decades of experience in business management and skills acquired during his military service, Robert not only ensures his clients receive world-class service, but that the organization maintains a team culture conducive to retention and growth.

Perhaps it is the resolve and drive he learned from sports as a champion student-athlete, or the strength and comradery he experienced during his service in the U.S. Navy, but the culmination of these principles has surely contributed to his penchant for safety and security. In evidence of that, Robert's book, *Safe City: From Law Enforcement to Neighborhood Watched*, shares his expertise on keeping cities safe so that people can thrive, a message consistently carried throughout Source 1's corporate culture. The book debuted as the *#1 New Release* in the *Privacy and Surveillance in Society* section on Amazon. In his own words, Robert shares, "Securing and serving our neighborhoods is essential to fulfilling community responsibilities. Empowering and helping others is non-negotiable."

We spoke with Robert to learn more about how he got into IT and security, what makes Source 1 Solutions unique, and what drives him toward continued growth.

Q: Robert, tell us how you got into the field of IT.

A: I joined the military after my first year in college, where I was stationed in Jacksonville. I fell in love with Florida and ended up moving to Tampa and selling telecommunications equipment. Over time, I advanced to VP of sales, then became a partner in the company. In 2011, I decided it was time to build something that would improve upon the industry standard of customer service. So, with just $5,000 and no investors, Source 1 Solutions launched.

Q: And how has the company evolved over the last decade?

A: No different than any other start-up, in the beginning, we took on any deal in the industry to generate cash flow. With tenure and experience, we matured and better identified our core business offering. Once the core offering was truly established, that's when became profitable.

Hessel

Similar to how the business matured, our relationships with customers in the industry matured as well. With those stronger relationships came more and better opportunities. Those opportunities came with more profitability and the ability to say "yes" or "no" to deals, which really defined what our core business is today.

Q: What makes Source 1 Solutions unique?

A: Source 1 Solutions primarily works with two types of customers, globally: end-users and channel partners. In both scenarios, we offer "white-label" services. This means that we take on the brand identity of the customers we serve. These enterprises retain us as their partial or entire IT department. Meanwhile, their customer never knows they've outsourced IT management to us. Outsourcing IT needs to Source 1 comes with incredible benefits. Aside from versatile skillsets to lean on and layers of built-in accountability, we were named one of *Inc. 5000's Best Workplaces in America*, which makes us very attractive when recruiting top talent.

Q: What do you enjoy most about your work?

A: After so many years in business, nothing quite beats seeing my team succeed both professionally and personally. During the toughest times these past few years, we were so proud to see our people buying their first homes and expanding their families. Beyond that, it would be considering our future and employing strategies that will continue to support our success.

Q: What do you consider to be your greatest accomplishments?

A: First, we just celebrated our 10-year anniversary, which statistically, is not an easy feat for an entrepreneur. Also, becoming a global brand and being named a *Best Workplace in America*. Personally, I was honored to be one of *Industry Era's Top 10 CEOs* of 2021 and, of course, being featured in *Beyond the Game*, a documentary that follows the journeys of celebrated athletes as they transition to second careers in business, entertainment, and entrepreneurship, which premiers later this year.

Q: Lastly, Robert, if you had to summarize your objective in a single sentence, what would it be?

A: To use my entrepreneurial experience, passion for technology, and understanding of global markets to empower others and give back to the community.

Source 1 Solutions awards include: Inc. 5000: Best Workplaces in America 2021, Inc. 5000: 2018, 2019, 2020, 2021, Business Observer Top 500: 2017, 2018, 2019, 2020, TBBJ Fast 50: 2016, 2019, 2020, 2021, SD & I Fast 50: 2018, Honeywell Community Service Award: 2014, 2015, 2019, Honeywell Outstanding Sales Achievement: 2014, 2019, MSP 501: 2020, 2021, TBBJ Top Veteran Owned Business: 2020, Private Titans: 2020, TBBJ Best Places to Work: 2019, 2020, Inc 500 Florida #11: 2019, SMB Hot 1010: 2020, and Top 500 Largest Companies on the Gulf Coast: 2020, 2019, 2018

SOURCE1® SOLUTIONS

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Khori A. & Dr. Nasha T. Hunter

Few things are more heartwarming than the smile of a child. It has the power to delight us as adults, but more importantly, it is one of the most impactful means of starting a friendship for a young person. An attractive smile elicits confidence, and nothing is more critical during a child's developmental years. Unfortunately, for most children, visiting the dentist can be a frightening experience, and for parents, it can be nearly intolerable. For the residents of Sugarland and Richmond, Texas, however, life just got a lot easier.

The husband-and-wife team of Khori Hunter and Dr. Nasha Hunter created two "dental homes," where children, teens, and special needs patients can actually enjoy visiting the dentist. Sweetpea Smiles Dental Group is a carefully constructed environment that is more akin to a friendly playroom than an office, where everyone, including parents, can feel safe, secure, and worry-free. Whether for preventive dentistry, dental emergencies, sedation dentistry, orthodontics, or general oral health, the group of dentists at Sweetpea Smiles ensures that each visit is pain-free and that every patient gets the smile they deserve.

Whether a result of Khori's business expertise and savvy, Nasha's expertise and love for helping children, or their cooperative desire to build a business (to serve families in the communities they serve) around their family, the Hunters have carved out a niche, and in the process, have nearly eradicated the stigmas associated with pediatric dentistry.

We spoke with president and CEO, Khori, and chief clinical officer (CCO) pediatric dentist, Dr. Nasha Hunter, to learn more about them, their practice, and the secret to their success.

Before we talk about your practice, let's get an idea of who you are as individuals. Can you give us some insight into your backgrounds?

Khori: At heart, I'm an entrepreneur, but my background is primarily in engineering and business management. I've started quite a few organizations and learned a lot from those experiences. My most recent venture, aside from Sweetpea Smiles, is Pareto Growth, which is a consulting firm that helps companies scale and grow. During the pandemic, we've assisted more than 100 small businesses. I think that my experience is the perfect complement to Nasha's. She handles the clinical operations and I take care of the business components.

> We provide a fun, safe, and nurturing environment for children, while helping them develop good oral health habits from an early age.

Nasha: I've known I wanted to be a dentist since I was 12 years old. This desire was inspired by my family dentist back in Jamaica, who owned her own practice. I pursued the dental field academically right after college and received my BS in biology from the University of the West Indies in Jamaica. My parents, who were very supportive, invested in me going to Howard University for my Doctor of Dental Surgery degree. After graduating dental school, I completed a two year general practice residency, practiced as a general dentist in Jamaica in a private office for 1 year, and then completed my pediatric dental residency at Bronx-Lebanon Hospital Center. For the past 11 years, I've focused on preventive dentistry, full mouth dental rehabilitation, sedation dentistry, behavior management, interceptive orthodontics, and providing oral health care for special needs patients.

What is the mission statement for Sweetpea Smiles Dental Group? What is your primary goal?

Our vision is to build and support a network of pediatric "dental homes" that will offer more access to better care for more families across the United States. We provide a fun, safe, and nurturing environment for children, while helping them develop good oral health habits from an early age. As a resource for education and information, we also build meaningful relationships with parents, their families, and the communities in which we serve.

sweetpea smiles
Dental Group

I understand you are both from Jamaica and met in college. What goals do you share as a couple and as a team?

Khori: I think the most obvious commonality is our love for children. We work together as parents and as business partners, but these two roles are not necessarily mutually exclusive to each other. As parents, we can identify with the struggles that everyone has, especially when it comes to taking the kids to the dentist and building children's self-esteem. That recognition leads to solutions for the business. If you can't make the family dynamic work, there would be little chance of success in structuring a professional team. I find great reward in seeing the staff develop and achieve a common goal, much as I do watching our family grow.

Nasha: Khori and I are fortunate to work well together at home and on the business. We both love what we do, so we act silly and laugh at work, and our patients see that. It puts them at ease, which is, after all, the very foundation of our practice. And I love to see all children, not just my own, enjoying themselves, growing, and thriving. It's an honor and a privilege to be a part of their journeys, and if giving them a healthy smile makes their paths a little smoother, I'm blessed to give them that.

> "Our vision is to build and support a network of pediatric "dental homes" that will offer more access to better care for more families across the United States.

What would you say are your greatest achievements?

Nasha: Aside from starting a family and building Sweetpea Smiles with Khori, it would be becoming board certified. Although to maintain the certification requires continuing education, which can be challenging with regard to time management, I'm proud to dedicate myself to this very special area of dentistry. It allows me to offer the latest technologies and advances in our growing patients, which are often not available in other offices.

Khori: My family and creating our Sweetpea Smiles signature "dental homes" are definitely at the top of the list. I do find my role with Pareto Growth extremely fulfilling and I am proud to be acknowledged as an Accredited Fort Bend County Gold Badge Consultant for assisting local businesses rebuild through the COVID-19 Pandemic.

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RUSSELL MOON

The Next Moonshot

Disrupting an established industry might sound a little daunting or unattainable to most—especially those filled with behemoth conglomerates and countless "me too" brands biting at ankles. The idea that one can start something from nothing, build it up, and show established players there's a better way is what most would call a "moonshot." (or a long shot, for those unfamiliar with the phrase). That's precisely what gets Russell Moon out of bed.

In 1994, Russell was introduced to a skin care industry focused on covering up skin to look "pretty" instead of making skin healthy and radiant on its own. With the help of world-class research teams, he and his co-founders, Alden Pinnell and Dr. Sheldon Pinnell, developed and patented topical solutions that would forever change the way people care for their skin by leveraging antioxidants in topical applications to prevent damage from harmful elements like free radicals from pollution or excessive sunlight. Those early pioneers co-founded a company to take the novel technology to market—SkinCeuticals. Russell and his co-founders achieved a skincare moonshot by growing SkinCeuticals to $35 million before selling it to L'Oréal. Today, it's the leading cosmeceutical and a brand likely worth more than $1 billion.

While most entrepreneurs might celebrate a triumph of this magnitude by resting on their laurels, Russell set his sights on tackling his next big challenge—and this time, it was personal. As an adult orthodontics patient, the scraping and stabbing of Russell's gums left him with a great deal of pain and with a question echoed among ortho patients for generations: "How can I make my mouth feel better—and fast?" But Russell had something they didn't—a mountain of research on the effects of topically applying antioxidants calling his name, offering a solution.

As he began researching the oral care universe, he found a familiar foe—behemoth conglomerates more interested in solving a singular problem in the mouth rather than making the mouth healthy and beautiful. Russell had found his next moonshot.

He worked with researchers at Texas A&M University Health Science Center, Baylor College of Dentistry, the UNC-Chapel Hill School of Dentistry, and many prominent clinicians researching many of the same antioxidants, but now topically applied in the mouth. The result—a groundbreaking system of oral care products branded as PerioSciences. Russell was determined to bring what he'd learned to bear: cut out the fluff and filler used by other companies, design a novel two-part approach to oral care with natural antibacterial and antioxidant ingredients, and deliver the safest, most effective products possible.

PerioSciences's products were sold exclusively to the dental community. Almost immediately it became one of the most trusted brands among dental professionals with hundreds of customers, but Russell noticed new e-commerce brands entering the market with inferior products. Their brands were compelling, but he felt their claims confused consumers. His mission was clear—he had to open PerioSciences directly to consumers. To accomplish this, he enlisted two accomplished co-pilots, Bryon Morrison and Nicholas Henderson, who form the PerioSciences direct-to-consumer marketing and leadership team.

Bryon is an experienced entrepreneur in his own right. He brings a decade of Omnicom agency experience with companies like AT&T, Limited Brands, Pepsico, and many other global industry leaders. Nicholas offers one of the most innovative perspectives on digital advertising in the space, which has allowed him to grow amazing start-up brands like Hari-Mari and Poo-pouri. Together, they believe in Russell's vision and his plan to take it to the moon.

We sat down with these entrepreneurial leaders to learn more about their mission.

So, why are you so focused on the mouth after all your success focusing on skin?

Russell: The mouth is the gateway to the rest of the body. Not taking care of your mouth can have a substantial impact on the rest of your health. People don't understand how they're prematurely aging their mouth by not caring for it. It's similar to a metabolic age being higher than your actual age if you're out of shape. If you subject your mouth to a lifetime of bad treatment, then it may show

signs of aging like chronic bad breath, dry mouth, or inflamed, bleeding and receding gums. No one wants their smile to show their age, and we can help.

Do you think consumers understand the difference between "oral health" and having white teeth?

Nick: I do. I think consumers want beauty, but they don't want to sacrifice their health to get it. The media attention over the last ten years has really educated consumers about the link between mouth ailments and unhealthy bacteria, plaque in the mouth, heart disease, and, most recently, COVID.

Bryon: You can have teeth whiter than your kitchen sink and still experience all the problems Russell mentioned. But you don't have to. Russell proved with SkinCeuticals you can have beauty *and* health in the same product. Now we're proving that in oral care with PerioSciences.

How are your products different from other toothpastes and rinses?

Russell: Previously, the goal of oral care has been to reduce bad bacteria in the mouth—kill the bad bugs in your mouth, then your mouth is healthy. We still use natural antibacterial ingredients to achieve that goal, but we include combination antioxidants in our products that will complement and amplify your body's natural systems of keeping itself healthy.

What led to the transition from PerioSciences 1.0 to your consumer-focused 2.0?

Russell: We spent the last decade educating and working with dental professionals to bring antioxidants to the oral health space. We created a kind of cult following with customers returning to their dentists specifically to buy our products. As demand increased, I wanted to share our solution more broadly with consumers while continuing to serve dental professionals.

Bryon and Nick, what compelled you to join PerioSciences?

Bryon: I believe in all of it. The product is amazing, and the vision will make a difference. I've worked with so many brands that are indulgent or superficial, but they're not good for you. PerioSciences is the opposite. It truly solves dental problems that most people experience and can affect their daily lives, and does it all while providing a beautiful, healthy mouth.

Nick: After working at Poo-pouri, I just liked the idea of focusing on a different orifice. Just kidding! I agree 100% with Bryon. I'm here because a product like we have here actually gives me a chance to create a movement and to feel like I've done something worthwhile.

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> Our combined network in these areas, complemented by our individual strengths, gives us a distinct advantage that benefits our entrepreneurs and investors.

to combine my love of the healthcare industry with my expertise for commercializing intellectual property and securing funding for new businesses.

What does your work entail, both on behalf of companies to help transform them and take them to the "next level," and on behalf of investors who are considering investing in a particular company?

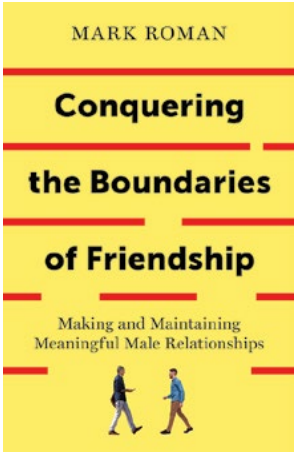
We focus on operations diligence, business transformations, and IT strategy for healthcare and manufacturing targets and portfolio companies. We look at staff skills, succession plans, top supplier and client contracts, and examine all the operations. We give investors confidence that operations are sound and sustainable. We look at back-up and business continuity processes and assure the company and their investors that the company is operationally stable; we don't do any financial or legal diligence.

One illustration of our proficiency was confirmed when a private equity client called and said, "Next time I'm in Cleveland, I'm going to buy you guys dinner so you can say 'I told you so.'" We asked him what he meant, and he reminded us that when we had performed diligence on one of the firm's investments, we highlighted a risk in their manufacturing process—that raw materials and finished product were kept in the same storage

facility in their manufacturing plant. We recommended that they be kept in separate warehousing facilities outside of the plant. We also suggested that they have a manufacturing facility under contract for increased demand. We learned that the company had a fire, which ruined over $40 million in raw materials and finished product. This example conveys our pledge to mitigate risks for entrepreneurs and their investors. We also do portfolio reviews for private equity companies, where we'll come into a capital management firm and perform operational diligence on all of the companies in their portfolio. We'll grade the companies from A to D, so that the private equity firms can have an optic on where they may consider investing additional funds in the future, based on operations.

What makes your company different from others in the industry?

We have over 300 contractors from all sectors of healthcare and manufacturing, so if we need a unique skill, such as medical device manufacturing, we have someone with whom we've worked before, who can bring that skill to the diligence project.



You're also a best-selling author with a third book currently in the works. What compelled you to write your first book, *Conquering the Boundaries of Friendship*?

Conquering the Boundaries of Friendship was written during my rehab in 2018, after I had emergency brain surgery for a very rare, undiagnosed, asymptomatic birth defect. I had the idea for the book years before but decided that writing it would be a good exercise for brain function, organizational capacity, and motor skills. It was all of those things, for I ended up interviewing over 200 people.

The most rewarding result of its publication was the letters I received from readers. One woman, whom I'll call Michelle from Minneapolis, wrote to me that she had seen my book sitting on her husband's nightstand and she decided to read it. Based on what she read in the chapter, titled, *There's No Crying in Baseball*, which is about the subtle and not-so-subtle messages we send our children about growing up, she and her husband decided to raise their children differently. Those letters are what really motivate me to write. I've always loved writing, but who knew I would be any good at it?!

Tell us about your upcoming book about entrepreneurs and founders.

The working title of the new book is, *Financing for Founders and Entrepreneurs - What They Don't Teach You in B-School about Securing Funding for Your Business.*" I've interviewed over 150 partners, origination experts, and finance professionals because this book covers every aspect of securing financing to launch your business or take your business to the next level. It includes information about everything from bootstrapping your business, to SBA and bank loans, angel investors, friends and family private equity, venture capital, and family offices. Every potential interviewee who I sent the book synopsis to, said "Wow, you're doing a real service to entrepreneurs, founders, and the industry." I'm co-authoring this book with my business partner, Greg Johnson.

My next book is titled, *You're Cured - the Definitive Guide to the Healing Process for Patients and Caregivers*. For this book, I've interviewed over 400 patients and primary caregivers. It is a hopeful book for anyone who has overcome severe physical or mental trauma.

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

I love helping leverage investments for the innovative discoveries, operational improvements, etc., that will benefit as many people as possible. "You don't have to sleep to dream. You can dream about what you want to do, and you can plan for it, and make it happen." This is one of my favorite phrases. To this day, I get a thrill every time I see how our work is helping other human beings.

Mark was awarded *Author of the Week* by the Nonfiction Authors Association (NFAAA) a professional association for non-fiction authors. He is a regular contributor to several podcasts and webcasts on leadership and a featured speaker at the Veale Institute for Entrepreneurship at Case-Western Reserve University. He is a member of the president's council for The Colonial Williamsburg Foundation, a member of the Raleigh Tavern Society and Goodwin Society of the Colonial Williamsburg Foundation, and chairman of the board for the Jamestown Rediscovery Foundation of Historic Jamestown. In addition to a B.S. in operations management and organizational behavior from Case Western Reserve University, he holds a professional certificate in strategy and shareholder value creation from London Business School in England, and a professional certificate in venture capital and private equity from Bosconi University in Milan, Italy.

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Q&A

SCOTT COMER

For years, New Jersey Senator Cory Booker has told allies and adversaries alike "I see you, and I love you." For seasoned political operative Scott Comer, these words serve as a guiding light that informs his work in politics, philanthropy, and the private sector. At just 30 years old, Scott is a respected Washington "insider" whose consulting firm roster reads like a *Who's Who* of the Democratic Party; his wisdom and insight belie his age. He is the resounding—and hopeful—voice of a new generation that is determined to be heard and the energetic, passionate founder of Fortune Hill Group. The Maryland-based political fundraising and events management firm is dedicated to maximizing its clients' resources and influence, with a keen focus on supporting Democratic candidates of color and social justice initiatives. Since opening its doors in 2017, Fortune Hill Group has worked with numerous political campaigns, party committees, and progressive organizations. They have supported such notable leaders as President Joe Biden, New Jersey Senator Cory Booker, Michigan Governor Gretchen Whitmer, Georgia Congresswoman Lucy McBath, and Florida Congresswoman and vice-presidential finalist Val Demings - who recently announced her candidacy for U.S. Senate. Fortune Hill Group also counts The Martin Luther King, Jr. Memorial Foundation and The Trust for the National Mall among its client list. We spoke with Scott about his greatest sources of inspiration, his role as a champion of aspiring—and *inspiring*—leaders, and some of his most memorable experiences from the campaign trail.

What are your primary responsibilities as Fortune Hill's Founder and Principal?

First and foremost, I am the firm's chief strategist. I am constantly surveying the nation's political landscape in exacting detail. The data points that I collect – public opinion polls, demographic trends, national party messaging, candidate skill, campaign organization, etc. – ultimately converge to reveal comprehensive election models that I reference to create campaign finance strategies for my clients. Because I have cultivated close relationships with many Democratic Party donors, I use these insights to raise millions of dollars for my clients by connecting them with high net-worth individuals in my network. I have cultivated relationships with these donors over many years and call on them for support when I suspect that a client's story will resonate with them. I also support nonprofit organizations that promote collective healing through racial justice, which is among my top priorities.

You place great emphasis on supporting candidates of color. Why is this important to you?

Public service is meant to uplift the downtrodden, to see the unseen, and to champion the forgotten. As Senator Cory Booker often says, "If America has never broken your heart, then maybe you don't love her enough." My love for our country has never wavered, but she has certainly broken my heart and the hearts of marginalized communities everywhere, particularly communities of color. My journey has been about leveraging my skills to support vulnerable incumbents and candidates of color who have limited access to national donor networks and whose voices must be elevated. I'm a man of faith; I believe that we are our brothers' and sisters' keepers. That enduring truth informs every decision I make in my career, from which candidates to support to which policies to endorse. Most importantly, it commands me to reach across divides of race, gender, political affiliation, and sexual orientation to demonstrate "courageous empathy" for people from every walk of life.

Cory Booker and Val Demings have served as your greatest inspirations. Tell us about this.

Both inspire me to persevere on even the hardest days. Washington has no shortage of cynics and naysayers. The first time I heard Cory Booker speak, I left with tears in my eyes. Listening to his sermon of civility, he kept returning to the theme of "courageous empathy." To me, this means we each have our convictions and priorities, but at the end of the day, politics is about people. It starts with honesty across race and gender, opening your heart to hearing someone else's story, and having the empathy and willingness to jump across the divide and embrace someone who's different from you. Similarly, Congresswoman Val Demings has become a role model, friend, a mentor—and my birthday buddy. I want every little girl growing up Black in America to see their own potential in her American Dream. To see a woman who faced so many obstacles to become a congresswoman at the top of the Democratic Party is both moving and deeply inspiring.

What compelled you to enter politics?

When I was a boy, my father and I traveled to Washington to celebrate my eleventh birthday. I was awestruck as the Capitol Building whizzed past the windows of our taxicab. We drove past the Washington Monument and the Lincoln Memorial, and it stirred something in me, this reverence for democracy. A few days later, we attended a Senate Armed Services Committee hearing. I didn't know what the meeting was about, but I knew that I was in the presence of many guardians of American democracy. It was in

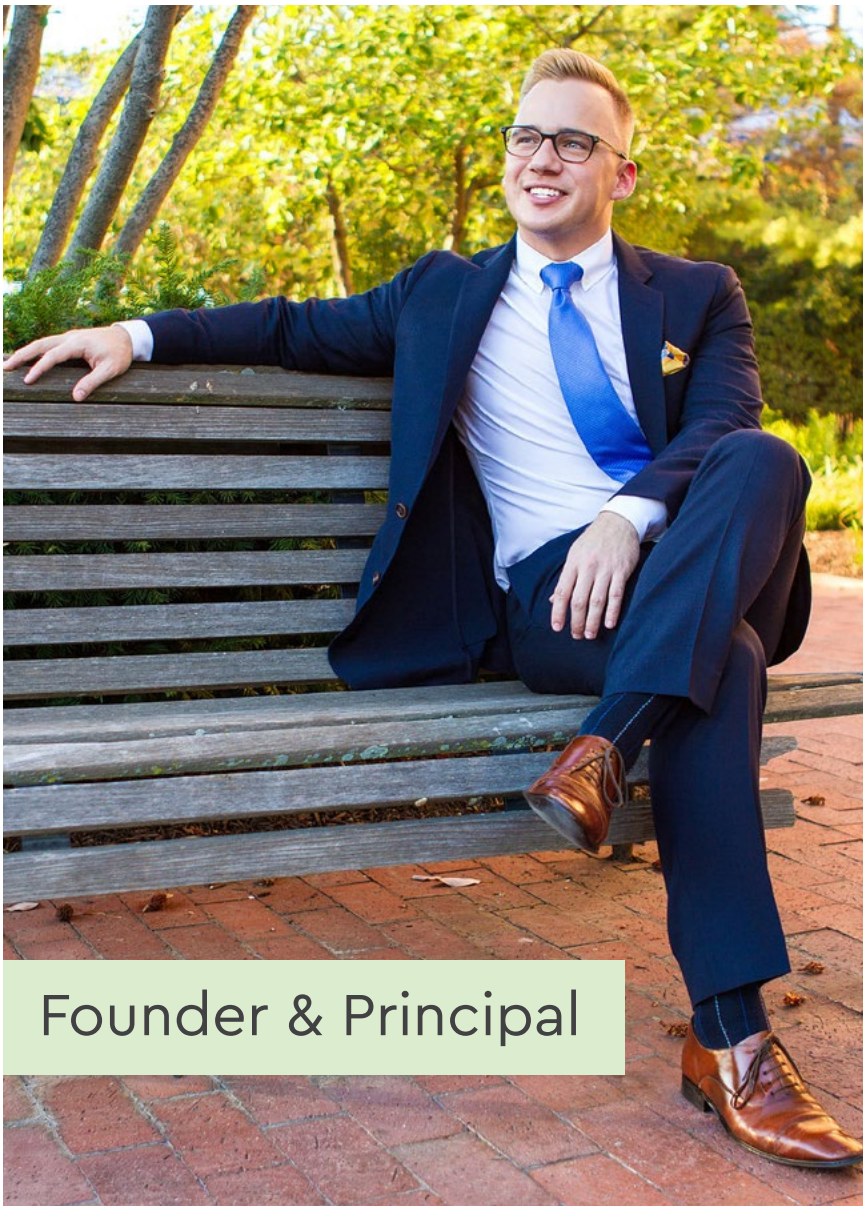
that moment that I knew I was going to be in politics, and there was never a moment where I cast aside that dream. America is a project to which there is no conclusion. It's something that must be nurtured and protected, and I remain determined to play an active role in it.

My journey has been about leveraging my skills to support vulnerable incumbents and candidates of color who have limited access to national donor networks and whose voices must be elevated.

In 2012, I was accepted into President Obama's *White House Internship Program*. I went on to serve as special assistant to Maryland Governor Martin O'Malley before joining Lt. Governor Anthony Brown's gubernatorial campaign as director of constituency engagement. The following year, I was asked to serve as the Democratic National Committee's finance chief of staff during the 2016 election cycle, which was a tremendous honor, and I founded Fortune Hill Group the following year. This whole journey has been such a blessing. I always dreamed about it, but I'm eternally grateful that it became a reality.

You have planned tremendously successful donor receptions featuring President Biden, governors, and members of Congress. Can you share a few of your most memorable events?

I place a great deal of emphasis on curating special experiences for donors and their guests, from surprise celebrity appearances to thematic catering, and flowers, to the layout of the space and everything in between. It's hard to choose a favorite, but the first one that comes to mind is a weekend donor retreat I organized in Miami Beach for 150 DNC supporters—my responsibilities included suite assignments,



Founder & Principal

food and beverage, daily programming, and securing speakers ranging from the Cabinet to Speaker Nancy Pelosi. Later Chairwoman Wasserman Schultz would refer to it as the best donor retreat she'd ever attended. I was also assigned to multiple events featuring President Obama, including my own event, the committee's annual LGBT Gala.

Scott holds a bachelor's degree in history with a minor in art history from the University of Maryland, where he was awarded the President's Scholarship. His senior thesis "Pillow Talk Politics: The Influence of the Countess of Castlemaine and the Demise of the first Earl of Clarendon" was published by UMD in 2013. Scott is a member of the American Association of Political Consultants, the Chief of Staff Association, and is a silver life member of the NAACP. He is also a founding member of the Cory Booker for Senate National Finance Committee and serves as finance chairman of the Montgomery County Democratic Party.

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FORTUNE HILL

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LI: Scott Comer

Jesse Pelletier

Chinese ophthalmologist Li Wenliang sounded the COVID-19 alarm alerting the international community about a concerning respiratory syndrome developing in China. His heroic actions would save many lives. In the long months that followed, as biopharma and medical research labs worked fervently to find a cure, a chorus of learned voices from physicians and medical leaders ushered the public through one of the deadliest pandemics in American history. Among them was Jesse Pelletier, co-founder and chief medical officer of Veloce BioPharma. He is a doctor who has shared his COVID-19 expertise across a legion of television, radio, podcasts, popular writing, and in peer-reviewed journals, including the *Journal of the American Medical Association*. He is a physician scientist and a thought leader in virology, immunology, and infectious disease. He is also an ophthalmologist and not unlike many of the physicians across this country who struggled to deliver care during an unprecedented time. Jesse is also a biopharma expert with over a decade of experience in the field, with a passion for advancing treatments in order to better protect our most vital sense organs, the skin and eyes.

On the heels of a historic acquisition for a viral conjunctivitis drug candidate, Veloce BioPharma was officially born in 2016 as a clinical-stage, private biopharmaceutical company, developing PVP-I based, novel drugs for indications across dermatology and ophthalmology. Simply put, the company focuses on topical therapeutics for unmet needs. With the world settling into a "new normal" of donning masks and remote working, Jesse and the medical team at Veloce BioPharma are driven to solve the growing trend of skin and eye disease emerging as a result of new, learned behaviors and interventions. With a well-developed pipeline that includes the completion of a pair of phase II clinical trials and a third scheduled to complete in 2022, and yet another set to commence just months later, one thing is clear—Jesse's passion and determination remain unabated.

We sat down with Jesse to learn more about Veloce BioPharma's work in groundbreaking pharmaceuticals and what it means to be a doctor and a chief medical officer in the time of a global pandemic.

Q: Your core expertise is in topical therapeutics for dermatology and ophthalmology. Tell us about your dual roles as the leader of Veloce?

A: My success in Veloce BioPharma is commensurate with and reliant upon the success of my colleagues. I'm referring specifically to our CEO, Joe Capriotti, and president, Kara Capriotti. We work seamlessly together. The expertise that Kara brings in dermatology and Joe and I bring in ophthalmology is truly synergistic. This is a very exciting time for our company.

The role of the chief medical officer has certainly evolved during the pandemic. Traditionally, my role has been to provide leadership and direction for the pipeline of clinical development programs. I'm responsible for strategy and execution of the clinical development plans. But my role now has really bifurcated in the sense that the CMO has become a notable figurehead representing the company in external affairs involving the media, key stakeholders, key opinion leaders, and patient organizations. For many CMOs, their updated, COVID-related objective now includes protecting the health and safety of the workforce. To accomplish this, a healthy understanding of the basic tenets of virology, immunology, vaccinology, etc., is compulsory, and ophthalmologists are well versed in these areas.

Q: Give us a summary of what Veloce BioPharma does.

A: We focus on topical therapeutics for unmet needs. We're essentially a biopharma company that is focused on the skin, treatment of disease that affects this vital organ, and how it interacts with the eye. The skin plays an important role across a variety of disease indications. For example, the thin skin of the eyelid contains myriad complex structures that contribute to the health of the eye and the ocular surface. The skin is also intimately linked to the nail and nail bed, which is a specialized form of skin epithelium. Therefore, not only are we looking to cure diseases of the skin, but also those of the nail bed and, to a certain extent, the eye.

Q: What types of pharmaceuticals do you focus on?

A: Our current pipeline of pharmaceuticals is focused on the use of iodine technology in the form of povidone-iodine (PVP-I). PVP-I has been used by the medical establishment as a safe and effective antiseptic for decades. Our technology enables us to extract the maximum safety and efficacy from this powerful antiseptic. Our formulations stabilize PVP-I at low concentrations and simultaneously increase the amount of free iodine available for antimicrobial effect. We then use, in combination with our iodine technology, a skin penetration enhancer. With this advancement we are able to push the iodine into deeper layers of the skin and treat all sorts of conditions, including warts, molluscum contagiosum, onychomycosis or paronychia, or even a specific type of eyelid inflammation called blepharitis.

> "I really felt an obligation, not only as a physician, but as a leader, to be a voice of reason and provide objective, unbiased, educated opinions without stoking fear."

Q: You have a healthy pipeline of developments. Tell us about some of these and what you're currently working on.

A: Our current pipeline includes a variety of drug candidates that are at different stages of development. We have completed two phase II clinical trials with positive results in the indications of chemotherapy associated paronychia (CAP)and molluscum contagiosum. These are two very disabling diseases that greatly impact patient quality of life. In each case, there exists no current FDA approved therapy. With respect to CAP, we're the first medical therapeutics company to pursue this indication in an attempt to address significant unmet need. We're also currently finishing our third phase II clinical trial for verruca vulgaris, or common warts. While the COVID-19 pandemic has delayed this read out, we expect results by mid-2022. Finally, one of our priorities in 2022 is to move into the ocular surface, dry eye, and blepharitis space, as the skin is critical to the health of the ocular surface. We have generated excellent data with one of our drug candidates for blepharitis with respect to its effects on thin skin and delicate structures of the eyelid. The eyelid is responsible, in part, for maintaining ocular surface homeostasis because of the key lipids produces there. You can therefore see how having expertise in treating dermatological conditions segues nicely into the field of ophthalmology.

Q: Because of trends you saw with COVID, draw a line to ophthalmology and your efforts to treat unmet needs in this area and your expertise in COVID-19.

A: I am both a biopharma entrepreneur and a practicing ophthalmologist. Ophthalmologists are generally well equipped to understand a viral disease like COVID, as we are well schooled in pertinent scientific disciplines, and we were—and remain—on the frontlines of the pandemic, treating an increasing number of eye diseases that have emerged from it. As a doctor with expertise in COVID-19, I found the media coverage to be generally uneven, especially in the early months of the pandemic-likely the result of a desire to inform quickly combined with a lack of understanding of the virus. I really felt an obligation, not only as a physician, but as a leader, to be a voice of reason and provide objective, unbiased, educated opinions without stoking fear.

From a biopharma perspective, there are some noteworthy ophthalmological trends that will guide Veloce. First, we are all spending much more time in front of computers, especially with interfaces like Zoom, which creates tremendous stress for the eyes and ocular surface. These activities decrease our blink rate and render our blinks incomplete. When this happens, the oils produced in our eyelids tend to stagnate, stop flowing, and we develop ocular surface disease and blepharitis. This is further exacerbated by our use of masks, which amplify both dry eye and blepharitis. Because these trends are unlikely to abate, we can use them to inform and better guide our company. For instance, the global blepharitis market size will easily reach 2B dollars in the next few years. This is testament to how impacted patients are by ocular surface disease and pharma's commitment to this address present and future needs. We believe that our future at Veloce should be one that reflects our continued work on dermatological conditions, but also one that now embraces important, worldwide ocular trends.

Veloce BioPharma

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Meet BRANDON YOUNG

FOUNDER, PRESIDENT, AND CEO

In 2019, seasoned professional Brandon Young left a successful career, working for a variety of large companies, to advance his own firm, Young Management & Consulting (YMC). Comprised of the crème de le crème, the YMC team is on a mission to deliver innovative solutions to an outdated industry. Brandon recognizes the need for extroverted technical professionals who understand the work, communicate effectively, and are highly structured. Having garnered more than 14 years of experience within corporate America, he also holds an in-depth understanding of where companies are missing the mark on employee and customer centricity, and he is inspired by YMC's ability to fill that gap. With offices in Atlanta, Georgia, Newark, New Jersey, and Chicago, Illinois, YMC leverages the power and expertise of cutting-edge technology and a wealth of experience in the electric utility space.

Since its inception, the YMC has been responsible for projects ranging between $4K to $10M and up to more than $100M. These include project and construction management services for New Jersey's Newark Switch Rebuild Project—Client Public Service Electric & Gas, valued at $361M; supporting the buildout of Verizon's 5G network within the North Carolina markets, valued at $30 million; and the Georgia Power Company Grid Investment Program, valued at $7.2B. As a young, trailblazing, entrepreneur focused on the electric and gas, infrastructure, and technology industries, Brandon has been featured in the *New Jersey Inquirer* as well as *The Chicago Weekly News* and made TV appearances on *ABC, NBC* and *CBS*.

We recently had the pleasure of speaking with Brandon to learn more about his career journey and drive to help others, as well as YMC and the suite of services the firm has to offer.

What does your day-to-day look like as CEO?

My responsibilities include providing and guiding YMC's vision and strategy to ensure sustainability and balanced growth. I also spend time kicking off new projects, fostering new and existing relationships, seeing that client expectations are being met by myself and our team, and making sure that our team members are happy and growing with the work they're performing.

Tell us about the suite of services you offer across energy, tech, and infrastructure as well as how you're leveraging technology to benefit your clients.

Young Management & Consulting is comprised of industry subject matter experts who support project and construction management, environmental compliance, supply chain/procurement sourcing, innovative technology development, cutting-edge technology conceptual and product development, geospatial services, engineering, and technical field services.

Our team has an average of 20+ years of experience managing large scale construction projects and can take a client's mobile or technology application from inception to application, with user and interface functionality. We're able to meet the needs of our clients by hitting financial targets through budgeting and scheduling as well as by minimizing and reducing each project's amount of risk and change orders. Other technical services we provide entail mobile app and web-based software development in the industries we serve. We automate and digitize data, streamline processes, track progress, and use tech tools to ensure projects are executed within a timely manner. We work with clients to bridge the gap between construction and technology by leveraging their data and modernized tech solutions such as AI and machine learning.

To what do you attribute YMC's success?

YMC is unique because as a boutique professional service provider, we can offer highly customizable solutions. We also attract talented people and provide them with opportunities to grow, which makes them want to stay with us. Additionally, we've been able to connect with partners who share the same mission and values that we do and who have a strong wish to support small, diverse businesses.

What do you enjoy most about the work you do?

What I enjoy most is helping others. No matter what we do or what industry we work in, at the end of the day, it's about helping someone else. We're not only adding value to clients' lives, but we're also showing younger and minority generations that there are a lot of opportunities out there for them to be successful. Over the next 20, 30, or 40 years, I want to leave a legacy and set a new standard for how this industry works. I'm driven by my family and my brother's legacy.

> **Our team has an average of 20+ years of experience managing large scale construction projects and can take a client's mobile or technology application from inception to application, with user and interface functionality.**

In what ways have you already been able to make an impact through YMC?

I stay engaged with all my team members, hire local talent, give to charity, and provide opportunities that may not fit the "typical" corporate profile. For example, during my first year in business as a full-time entrepreneur (in the midst of the pandemic), YMC donated $25,000 to charity. The money was spread across the areas where we work.

What positions did you hold prior to founding your own company?

I graduated from Auburn University with a bachelor's degree in electrical engineering and then spent my entire career supporting and managing large scale programs for utilities such as the Army National Guard, Savannah River Nuclear Solutions, Burns & McDonnell, and Welty Energy. I also became a certified project management professional and earned a master's degree in engineering construction management from University of Alabama Birmingham. My first position was at Burns & McDonnell, where I designed substations for Southern

Company. I then accepted an opportunity with Burns & McDonnell to work in the field supporting Public Service Electric & Gas. This is where I saw exponential growth. I worked on the biggest projects along the East Coast. The team was experienced, and I was a sponge. I was then offered the opportunity to join the next biggest program ever executed by PSE&G, the Bergen-Linden Corridor Program. The experience I gained was paramount and served as the foundation to YMC. We're doing what I saw worked in larger and smaller companies, and, ironically, we now have contracts with nearly all of my previous employers.

YOUNG
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Kyle Truesdell

Through technology and cultivation methodology based on decades of research, we enable the highest quality hemp and cannabis, at the largest possible yield, at the lowest price.

"Traditional American values." It's a phrase that invokes images of an earlier time; of hard-working families who were deeply rooted in the community. People who contributed to our growth and established a culture. Nowhere is this more evident than in the industry of agriculture. Most of us have dreamed of life on a farm, of working the earth, and the splendor of a field of crops ready for harvest. This is no mere reverie for Kyle Truesdell.

Kyle, like the generations before him, is a farmer. But don't let the undertones of that word deceive you. He's not plowing the lower forty or peddling grain to the local feed store. Kyle is in the *business* of farming, and like all successful businesspeople, he's operating within the current market, utilizing all the technology and innovations available to address the demands and trends of the modern world.

Kyle is the founder and CEO of Agrarian Group, and co-founder of Agrarian Supply, Agrarian Research Solutions, F1 Genomics, and Agrarian Farms. Although each of these entities are autonomous, they work in unison to service the continually growing demands of clients in the genetics, farming, chemical, hemp, and cannabis sectors.

We spoke with Kyle to learn more about the ever-increasing needs of the modern agriculture space.

Q: Kyle, can you tell our readers about the Agrarian enterprises and your role within them?

A: Agrarian Group was created to make high-level talent readily available as a service, providing otherwise unobtainable expertise in strategy development, business analysis, legal and compliance issues, HR, and growth management.

Agrarian Supply is essentially writing the playbook for the cultivation of crops with untold market demand—hemp and cannabis. Through technology and cultivation methodology based on decades of research, we enable the highest quality hemp and cannabis, at the largest possible yield, at the lowest price.

Agrarian Research Solutions was formed to service manufacturers. It provides third-party data collection and validation for federal and state registration requirements, technical marketing material, and grower adoption. Field trials through ARS allow for the testing of new pesticides, seed varieties, biologicals, and fertilizers at the highest standards, in a variety of locations and conditions. What differentiates ARS from the competition is the access to the largest cannabis and hemp grower network in the industry.

Agrarian Farms fills the needs of the market for well-trained and experienced commercial cannabis farming professionals. As the cultivation of cannabis has scaled at an unprecedented speed, the need for highly trained and skilled farm operators is, and will continue to be, a limiting factor in the industry's overall success. Our team has responded with a solution to the overwhelming requests for this service.

Lastly, F1 Genomics, Inc., researches and develops genetics for the agricultural specialty crop market, with a focus on difficult but high-revenue crops. We target customers looking for novel characteristics that generally fall into the following categories: pest resistance or other traits that boost quality and yields; hardiness, drought resistance, and similar traits that increase the range in which a crop can be profitably cultivated; and chemical composition of crops that can affect nutritional qualities, flavor, and processing for value-added products or label claims.

My responsibility to these divisions is supervision of the overall systems and processes associated with operation and sales. I focus on building the company culture and strategic direction, along with all business development relationships. My goal is to work *on* the business and not *in* the business.

Q: I imagine that with the growing demand for cannabis and hemp products, you've got your hands full. Can you touch on how it affects your business acumen?

A: Yes. We can't keep up. Business is booming so we are hiring constantly. During COVID, when everybody else was laying people off, we were actually doubling our business and we hired nearly a dozen people. We are really proud that we were able to support the job market and the economy during one of the most difficult times in recent history. We've grown over 300% in the last 12 months and 2.5 times during COVID.

Q: I'd like to go back to something you mentioned about Agrarian Research Solutions, regarding field trials. Is this a unique model?

A: What's unique is that other R&D companies who perform similar types of trials are not connected and don't have the access to cannabis and hemp; they simply don't have the expertise. We service over 70% of the market in California—we're the largest in

Agrarian Supply

the state—so we have the relationships and confidence with our client base and growers, and they allow us to run the field trials on their farms or in their greenhouses, etc.

Q: Do your companies benefit the cannabis and hemp *farmers*?

A: These companies represent the initial links of the fragmented supply chain that both industries currently need. The industry and current players have all focused on the "sexy" components, such as extraction, branding, and retail. What has been lacking is the science-based and data-driven professionals who represent the front end of the supply chain, such as farmers, agronomists, plant nutritionists, and geneticists. These roles are the "hands-on" jobs that the industry has not focused on because, ultimately, it takes a highly educated and specialized person to do so. Our group of companies is centered on what *the industry* needs and not just what *we* are good at.

Q: How long have you been in the field and what do you enjoy most about your work?

A: I have six years of experience in organic farming and fresh food processing as a sales manager for Earthbound Farm. I spent seven years in the positions of national specialty crop portfolio manager, retail branch manager, and pest control advisor for Wilbur-Ellis Company, LLC, and I have 14 years of agricultural sales, strategy, and management experience. As for what I enjoy most, hands down, it's the people. I enjoy helping others build their knowledge base and realize their fullest potential. There's nothing like working with somebody,

F1 Genetics

coaching them, and getting them to bring the most value to their company or position, but also themselves.

Q: Lastly, Kyle, can you tell us about your education?

A: I have a B.S. in agricultural business with a marketing concentration from California Polytechnic State University, San Luis Obispo, a California Pest Control Advisor License, a California Qualified Applicators License, and a National/International Certified Crop Advisor License. I'm also a U.S. Hemp Authority board member, a Texas Hemp Coalition executive board member, and a Sonoma County Farm Bureau member.

Agrarian FARM MANAGEMENT

Agrarian ADVISOR+

Agrarian RESEARCH SOLUTIONS

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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.

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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.

GKSD INVESTMENT HOLDING

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.

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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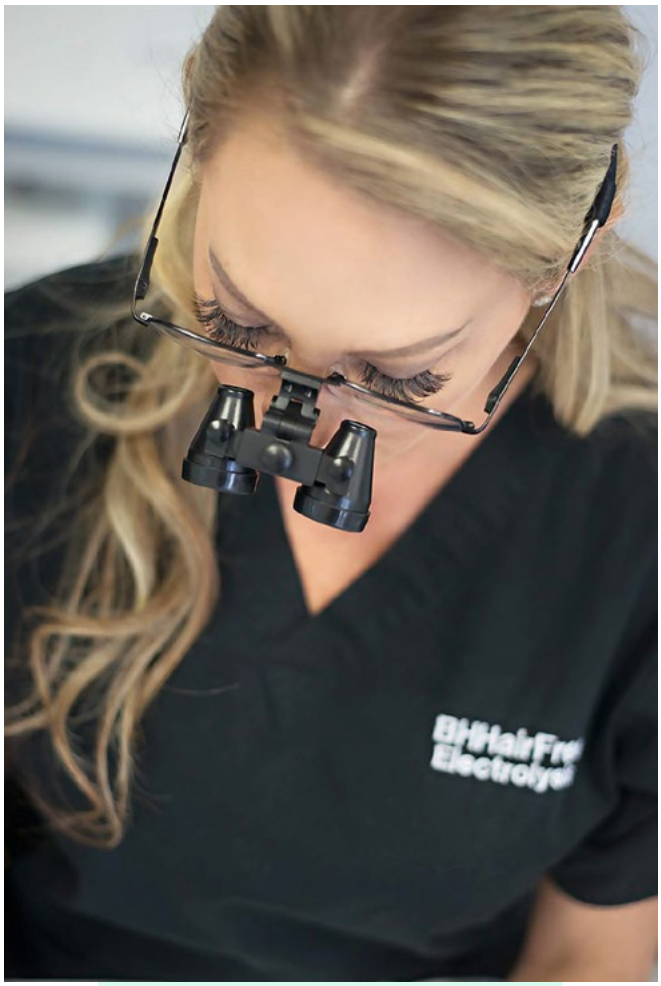
to build our own. After many dead ends, I finally came across some amazing partners and we formed Electrology Tech, LLC., the hardware and product division of my company. People say, "Necessity is the mother of invention," and it really is because I felt like I had the weight of thousands of people on 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,

CEO & COO

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.

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.

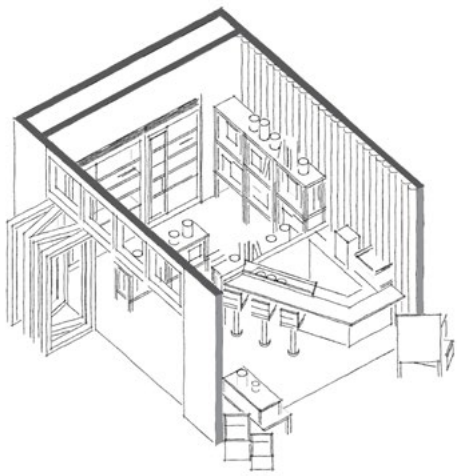
With her reputation as an innovative design leader continuing to spread, Kaylyn has been featured across media, including *VoyageDenver*, *Shoutout Colorado*, and *Our Response:ability*. We had the privilege of sitting down with her to discuss how Bristle + Bauble empowers people and businesses through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

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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.

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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.

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

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.'"

Co-CEO

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

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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

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

Allergy & Asthma NETWORK

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

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

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.

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

BLACK MOUNTAIN

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

JAMES GREY INTERNATIONAL

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Traci Beagley

FOUNDER/CEO

SUNLAND HOME CARE & MEDICAL

A Legacy of Serving Seniors Since 1958

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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

CEO & Business Broker

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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Lori Muller

Lori Muller loves to help things grow, whether it's people or the EXIT Realty brand. She knows a thing or two about what it takes to really facilitate that growth thanks to a sales career that started in the 1990's. Back then she answered an ad in the newspaper to *Travel the USA- Fun in the Sun* and left Wisconsin to start a door-to-door sales career that molded her leadership style today. Her career in real estate has taken on every possible role over the years, and she has earned a cache of certifications to go with it.

> Lori plays a direct role in supporting, empowering, and nurturing others not only as an inspiring and authentic leader, but as a mentor, giving them insight and bolstering their confidence to believe in their own capabilities.

Lori's career in real estate began in 2003, soon starting the first real estate team in her city, earning numerous awards along the way. In 2007, she bought the very first EXIT Realty franchise in Wisconsin. During this time, she served as a regional director along with opening multiple brokerages. She was involved in leadership positions at every level with her local, state, and the National Association of REALTORS®, received numerous awards including *Broker of the Year* for the Central U.S. region and Esprit des Corps for EXIT Realty, and the *Excellence in Professionalism* award from her local association. At the same time, Lori chartered a network of the National Women's Council of REALTORS® to fill the need in her area for empowering and educating women in the real estate industry, eventually taking the helm of the organization as state president, regional vice president, and eventually she was elected to the national executive committee. As a John Maxwell-certified mentor, trainer, and coach, she learned that "I must pour into myself so that I can pour into others."

In 2020, she was appointed vice president of the U.S. organization for EXIT Realty Corp. International by founder and chairman, Steve Morris, a position that was created specifically to reflect Lori's talents for internal growth. In just a year, she was appointed president of the U.S. organization and promptly sold her brokerages to concentrate strictly on increasing EXIT Realty's footprint across the United States, in particular, the growth and development of the agents and brokers, and attracting new talent to a company she absolutely loves. "We have a unique formula no one else in the industry has. We are a family disguised as a real estate company. This industry can be cut-throat, but within EXIT, we are collaborators for the success and growth of all. When one grows, we all grow," she stated with pride.

Lori plays a direct role in supporting, empowering, and nurturing others not only as an inspiring and authentic leader, but as a mentor, giving them insight and bolstering their confidence to believe in their own capabilities. It's an experience that keeps on giving back as Lori leads by example when she states, "Invest in you, so you can reinvest into others."

"Leadership is about listening to people. When you listen, it gives you the ability to impact people's lives, inspire them, and influence them to believe in themselves," she says, "That's what leadership truly is."

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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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GUIDE DOG FOUNDATION
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AMERICA'S VETDOGS
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Jason Twiford

Senior Account Executive

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

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 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.

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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

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.

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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KURTCYMERINT
CEO/FOUNDER

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."

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Andy Singh

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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

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,

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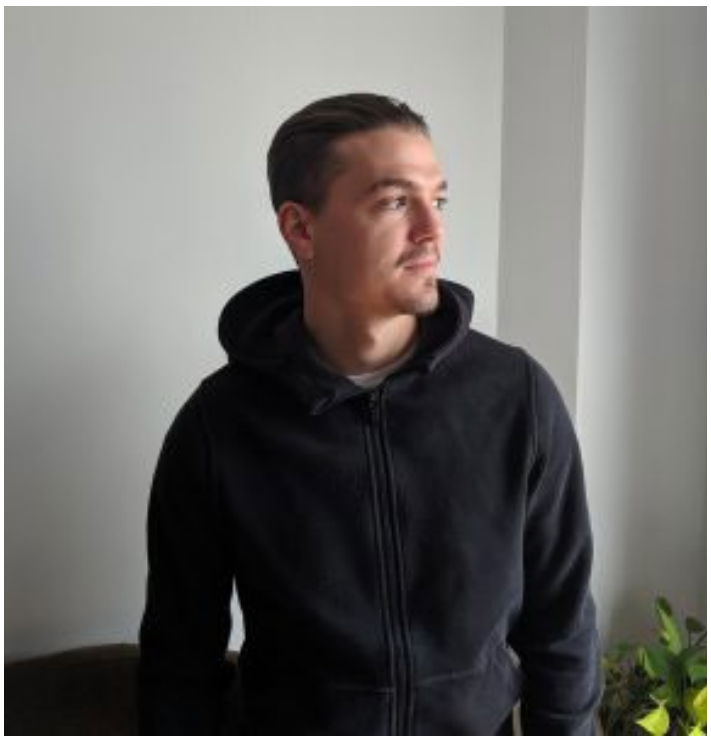
overseeing developments, or navigating tough legal concepts. Now, as the leader of AMOS Advisory, he uses the expertise and insight gained over his career to help his current clients build and rebuild their businesses.

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

Forest Founders REWARDS

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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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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*.

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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.

WOMEN LIFTING WOMEN

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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."

First Capital HOME SOLUTIONS

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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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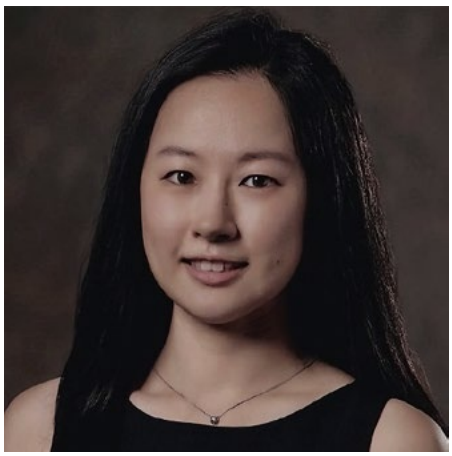
JIAYI "KRISTY" XU



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.

BizCatcher
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HONORABLE MENTION

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