



THE TOP 100 PEOPLE IN FINANCE

BORIS DESANCIC, FOUNDER, ASCENT WEALTH STRATEGIES

**HE'S MENTORED
OVER 100 FINANCIAL
ADVISORS AND WON
A CACHE OF AWARDS.
WHAT DRIVES
BORIS DESANCIC
TO KEEP GOING?**

-Find Out on Page #



Produced By:
Redwood Media LLC

Senior Editor:
Heather Andrews

Contributors:
Adrianna Barkey
Laura Caseley

Graphic Design:
Soha Farrokhi

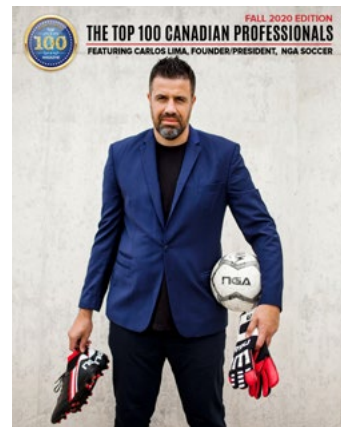
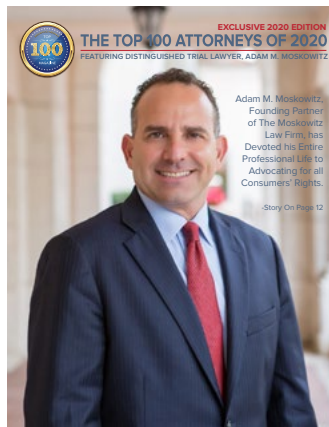
The Top 100 People in Finance
Copyright 2021
All Rights Reserved

www.TheTop100Magazine.com

Redwood Media Group
990 Westbury Road
Westbury, N.Y. 11590

This magazine is the intellectual property of Redwood Media LLC and its content is protected by federal and state copyright infringement laws. No part of this publication may be copied, reissued, republished, or represented by any person or entity without the express written permission of Redwood Media LLC. Violations will be prosecuted to the fullest extent of the law. The individuals represented in this magazine shall also be covered by the same federal and state copyright infringement laws and their editorial content and images shall not be reproduced or published without their express written consent.

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 finance industry.

Through the combined efforts of our account directors, writers, production staff, and artists, as well as the cooperation of everyone who is featured in this extraordinary edition, I believe we are presenting 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 People in Finance Magazine*.

Joseph Nunziato
CEO, Redwood Media

All of the information, images, logos, and individuals contained in this magazine are subject to copyright laws and intellectual property guidelines. No part of this magazine may be copied, published, or reproduced for any reason, without the express permission of the publisher. The editorial content of this magazine is not an endorsement for any particular service.

THE TOP 100 PEOPLE IN FINANCE

WHO'S INSIDE

A-E:

F-J:

K-N:

O-S

T-Z:

Top 100 Magazine selections do not pay to win or to be considered for the magazine. Individuals appearing in editorials however, may have paid a fee for increased exposure. Top 100 selects candidates utilizing proprietary software, which employs an algorithm to search a variety of online resources for industry-specific terms and keywords. These resources include social media, blog posts, peer reviews, and Google indices. Once the software has compiled a preliminary list of qualified candidates, our R&D department manually analyzes the results in order to make their final selections. For those selections who are financial advisors or wealth managers, certain additional criteria must be met. They include: 1. Registered with the SEC as a registered investment advisor or a registered investment advisor representative; 2. Not more than 1 filed complaint and never been convicted of a felony. Those selected for the magazine may purchase additional profile ad space or promotional products. Their selection is not indicative of the wealth manager's future performance or an endorsement by this publication. Working with a Top 100 Magazine advisor or wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment in the future.



JAMES L. MARCHESE

PRESIDENT/CEO

To say that James L. Marchese, MPA, JD, is a man of many talents would be an immense understatement as few others have ever worn such a wide variety of hats.

He is an experienced entrepreneur, banker, whistleblower, chief executive officer, film producer, and actor; yet his role as a husband to Amber and as a father to their children, Corbin and Isabella, is first and foremost. And while he's a devoted family man, he is also a skilled litigator and a financial thought leader who serves as president and CEO of MortgageNOW, Inc., a New Jersey-based company where he has lent and insured over \$10 billion in mortgage-backed securities. James also reviews potential business ventures and whistleblower cases by utilizing his master's degree from Columbia University and Juris Doctorate in law from Seton Hall Law School. In fact, he was recognized in 2015 for his role in helping the Department of Justice win a record \$16.65 billion settlement against Bank of America. He has appeared on *Money Beat*, *Fox Business*, *Good Morning America*, and *Watch What Happens Live*, and has been featured in *Wall Street Journal*, *Business Insider*, *Inquisitor*, *Daily UK*, *People.com*, and

Newsweek. He has also been a contributor to *Yahoo Finance* and was a top influencer on Twitter, with more than 9.5 million impressions per month.

When he is not working in financial services, James devotes time to his new-found passion—acting and producing in the film industry. He and Amber have both starred in *Real Housewives of New Jersey*, *Marriage Bootcamp*, and they are now working on a new project; a full length feature film and limited series *Abaddon*. We recently had the opportunity to meet with James to learn more about his unique, multifaceted career.

Q&A

Q: Let's begin with your roles as president and CEO. Tell us about the work you do at MortgageNOW.

A: I joined MortgageNOW in 2002, so I've been with them for nearly 20 years. We are a private equity mortgage banking firm as well as a non-supervised Title II lender, which means we make our own choices and decisions regarding lending, processing, underwriting, origination, etc., based upon the guidelines we choose. My office is in Shrewsbury, NJ, and at one time we employed over 500 staff members in twenty-five states. Since changes were recently made in federal rules, we've had to make some cuts and are now primarily focusing on our locations in CA, PA, MD, and NJ.

Q: How does the firm's flexibility benefit your clients?

A: At MortgageNOW, we can do things that 99% of other banks can't do. As a private equity, non-supervised Title II lender, we have the freedom to look at each borrower's individual loans and to make unique decisions that are tailored to each person. We also put together multiple options for our clients and have guidelines no one else can match. We can lend to self-employed borrowers, people with rapidly increasing income, young adults with student loans, and more. These days we are helping many self-employed borrowers refinance and find homes as well first-time home buyers. We are also helping those hurt by the COVID pandemic, who suffered interruptions of income. A significant portion of our business is helping people who the big banks turn down. We take great pride being characterized as the "Main Street lender" not the "Wall Street lender."

At MortgageNOW, we can do things that 99% of other banks can't do. As a private equity, non-supervised Title II lender, we have the freedom to look at each borrower's individual loans and to make unique decisions that are tailored to each person.

Q: As a life-long entrepreneur, how did you get involved in the film industry?

A: My wife, Amber, is an actress, who has starred in *Real Housewives of New Jersey*, *Marriage Bootcamp*, car and cooking commercials, appeared on *The View*, *Cathy Lee and Hoda Today Show*, *Watch What Happens Live*, *The Real*, *E Entertainment*, *Extra Extra*, and other international programs. So, a film team approached her about being in an upcoming project they were working on. They originally planned to create a limited series and shot the trailer along with several scenes. However, when they started editing, COVID hit. The team realized they needed to pivot, so the series was then transitioned into a full-length feature film which will lead to a limited series—*Abaddon*. One day, Amber asked me if I would be interested in producing the film, and when I looked at the project, I saw that it had great writing and accepted.

Q: You have described Amber as “the glue that holds everything together.” What else would you like us to know about your wife?

A: Amber is a remarkable woman, loving mother and an amazing wife. She is well educated, with a master's degree from Columbia University. However, it is her inner strength and faith that are her defining traits, not her education.

Amber is a New Jersey native who puts her family above everything. She lost her father, a war veteran, to pancreatic cancer at 19 years old. After just two years of marriage, Amber was diagnosed with breast cancer. At 31 years old, she underwent nine surgeries, including a double mastectomy and a year and a half of chemotherapy—all while caring for our children. It was a very difficult time as Isabella and Corbin were both under three-years-old at the time. She was in remission for several years before relapsing, but thankfully the second course of treatment has proven successful and she has been cancer free for over five years. She just amazes me with the dedication and hard work that she puts towards raising the children. She didn't like what was going on in the school districts, so she took the 'bull by the horns' and began teaching her own curriculum to our children. The four of us make a wonderful team together; my family makes life an adventure.

Amber is a remarkable woman, loving mother and an amazing wife. Her inner strength and faith are what holds our family together.



For James' Feature in The Wall Street Journal



Q: Amber is certainly a woman of strength, which also shows on screen. Will we be seeing her in *Abaddon*?

A: She is actually behind the scenes on this project. We are both executive producers and Amber does an amazing job of running the set. Surprisingly, I am the one who will be appearing on the big screen this time. I am trying to convince her to take a small part but so far, she wants to stay behind the camera. I think she likes being the boss.

James has appeared on *Money Beat*, *Fox Business*, *Good Morning America*, and *Watch What Happens Live*, and has been featured in *Wall Street Journal*, *Business Insider*, *Inquisitor*, *Daily UK*, *People.com*, and *Newsweek*. He has also been a contributor to *Yahoo Finance* and was a top influencer on Twitter, with more than 9.5 million impressions per month.



Q: What can you tell us about the plot?

A: The story follows two FBI agents investigating a series of gruesome murders in the Catskills. They believe the killings are cult-related and through a lead, end up interviewing my character for more clues. I play the role of Massimo, an Italian banker who was in a federal prison but now spends a lot of time trying to reform inmates through his religious order. As the FBI interviews me, they uncover a much deeper plot that involves corrupt judges, politicians, and businessman, who are committing crimes that have so far gone unpunished. The FBI believes I can assist in finding the group of killers but then realizes I am more of an asset for illuminating the pattern of how the victims are being selected. I can't tell you much more than that, but it's an exciting project that has taken center stage. The team has completed the script and filmed a few teaser scenes, so we expect to start a 26-day film shoot during Q4 2021. We are still looking to fill a few spots on the production/investor and talent sides, so if anyone is interested, I would love to hear from them. The opportunity to publish content is beyond anything seen in history due to the rise of streaming, so are expecting this to be a big hit.





mortgage **NOW** inc.

CONTACT DETAILS REMOVED



BORIS DESANCIC

the business world. His father, an idol to Boris, was a three-time Olympic athlete, a C-level executive, and a successful businessman, who forged his niche in the world of debt arbitrage concepts between world banks. His mother was a successful attorney, who was closely affiliated with the government's International Cabinet for Foreign Relationships. This environment cultivated an intrinsic strength, which allowed his family to endure the eventual loss of their secure lifestyle as war ensued. Boris was sent alone, at the young age of 17, to move ahead into an unknown but safer future in the U.S., that would allow him to ultimately rebuild and then expand on his family's legacy.

Boris, can you tell us about your company and your primary role?

Ascent Wealth Strategies is a wealth advisory firm that specializes in business tax strategies, estate and asset protection planning, and wealth management. The company was founded with a mission to assist clients in every aspect of their monetary affairs. To that end, we have developed one of the most comprehensive financial product platforms available today. Our goal is to build holistic, long-term relationships that facilitate optimal results for each client's unique scenario.

My role is very straightforward. I direct our operations, engineer our development, and my favorite part, I consult with clients. The interactions are always fascinating. Whether the client is a family looking to manage their wealth appropriately, a successful business owner trying to lessen the tax impact on his/her revenues, or a professional athlete taking the right steps to protect and expand on his/her new-found wealth, I always feel privileged to have a role in their lives and their financial future. So, every day is both thrilling and very impactful.

You've worked successfully for three decades. You've mentored over 100 financial advisors and won a bevy of awards. What drives you to continue?

I think it's a combination of factors. I have always been drawn to helping people and teaching. All of the interactions with my clients are intriguing. I enjoy taking complex concepts and making them seem simple and understandable. I'm also hyper-aware that I'm carrying forth my parent's legacy and building the legacy that I will leave to my daughter.

Ascent

WEALTH STRATEGIES

Life experiences, combined with our unique personality traits, set each individual's perspective on this world. They provide the impetus for each step we take and choices we make. Boris Desancic can best be described as a creative thinker who not only understands the underlying correlation between the past and the future, but is capitalizing on it. At this stage of his life, his particular "life equation" has led Boris to impart his own wisdom gained through experience and his assertive view of the future onto the lives he touches through his work. And while Boris forges into the future inspired and determined to modernize antiquated financial principles, he is ever mindful of how he got to where he is.

Raised in the former Yugoslavia, Boris witnessed firsthand, both great success and substantial struggles. Despite the ongoing turmoil in the region, his parents were both quite prominent in

I'm also very proud of the niche we've carved out in the business planning industry, and I'm compelled to progress it further. That our Revenue Protection Program is a genuinely unique approach, gives me a sense of pride. We constantly see clients who have seven-figure revenues but were never given this particular type of insight and assistance with their business and tax planning. I feel fortunate to be able to show them something new and genuinely impact their future for the better.

The three pillars of our advanced strategy that differentiate us are: income shifting, tax arbitrage, and asset protection.

Clearly you have an extensive knowledge of finance, and it is obviously a tremendous benefit to clients. Can you elaborate a bit on your career?

Well, I've been at this since I was 21. Straight out of college, I was an associate partner in a small, boutique wealth management firm. Shortly thereafter, I got involved as a managing principal with Waddell and Reed. They were starting a new firm in Seattle, and I was entrusted to build it up from scratch. It became one of fastest-growing operations in their history. By the time I reached year nineteen with the company, I'd begun to feel that I wanted to move into a venture of my own. That was when Ascent Wealth Strategies was born, and I continue to run it to this day.

When you founded Ascent Wealth Strategies (AWS), was there something you wanted to do differently in your firm?

One of the things I realized very early in my career is that not everyone has all the answers, including myself, so when I founded AWS, I worked hard to establish partnerships with individuals who I knew were bringing the best ideas and products to the market. As an example, through our partnership with Westpac Wealth Partners, we have access to the brightest minds in advanced business and tax strategies, and innovative insurance planning. Through our partnership with Clear Creek Financial Management, our clients benefit from sophisticated technology, investment management brain trust, and reporting. Our partnership with Helios Quantitative allows us to offer an institutional-side style of investment management to our retail clients. In addition, our relationships with prominent legal and accounting firms create access to trusted professionals who can execute on our clients' advanced planning needs.

The three pillars of our advanced strategy that differentiate us are: income shifting, tax arbitrage, and asset protection. These key areas are supported by at least a dozen other fairly intricate concepts. It seems intuitive to me to offer these services, so they are central to our work.



Founder

The company was founded with a mission to assist clients in every aspect of their monetary affairs.

Your Revenue Protection Program is a unique concept your firm brings to your Business Owner clients. Can you expend a bit on it?

Sure. For every successful business owner, it's critical to be proactive in the pursuit of retaining the greatest portion of their hard-earned revenue. While the professionals our clients already depend on provide them with crucial services, we usually find we are able to complement the work they do with our own and really elevate their outcomes to the next level. We do this by implementing our Revenue Protection Program, reducing tax bills in many cases by hundreds of thousands of dollars, shifting much of their risk exposure, and generally restructuring more antiquated plans into much more efficient and effective strategies.

Lastly, Boris, if you had to advise me as a client with just a few words, what would you say?

I'd advise you to build, protect, and preserve your current and future wealth, to establish your legacy, and create a roadmap for the generations to come.

Oliver — — Kupe

An Angel Among Us. The extraordinary financial leader enriching the lives of the unsung success stories—from victims of misguided justice to sports heroes to rising-star entrepreneurs.

About In a bustling office in the heart of Chicago, far from the Wall Street spotlight, there lives an angel among us—Oliver Kupe, president and founder of wealth management firm Aurélien Capital Partners. This might seem a play on words befitting his well-known reputation for accessing angel investments, venture capital, and private equity for some of the most successful startups in recent history—among them Airbnb, Spotify, Coinbase, and DraftKings. However, for many, Oliver is an angel who reached like a beacon of light through the sea of financial advisory firms that dismissed them to provide the life-changing resources that wealth management provides. In doing so, he, along with partners Nicole Meihofner and Cameron Dickerson, have built a firm that is gradually eclipsing \$100 million in assets under management in under 12 months—and he’s on a mission to help change the lives of some of the greatest, yet unsung, success stories of high-net-worth individuals.

From wrongfully convicted exonerees to professional athletes to rising-star entrepreneurs, Oliver works tirelessly to help provide the life his clients deserve. Founded in November 2020, Aurélien Capital provides boutique investment advisory and family office services with cutting-edge financial services that are creative, diverse, inclusive, and built to enhance their clients’ unique lifestyles. Prior to starting the firm, Oliver enjoyed a successful decade-long career as a financial advisor for Merrill Lynch and as managing partner with Fort Point Capital Partners. But a chance encounter with a wrongly convicted exoneree shone a light on the greater purpose that Providence had in mind for him. Now, Oliver and his Aurélien Capital team focus specifically on people who have defied life’s greatest odds and claimed its greatest triumphs—75% of whom are black clientele. Just a year since opening their doors, the firm is managing the assets of over a dozen exonerees and a roster of pro athletes that reads like a *Who’s Who* of the NFL, with players from the Indianapolis Colts, New York Giants, Houston Texans, 49ers, Philadelphia Eagles, and Denver Broncos.

As a full-scale family office, Aurélien Capital Partners specializes in four distinct areas: financial planning, investment management, private investments - with a focus on angel investments, venture capital, and private equity—and a service called “lifestyle management,” which caters to the unique lifestyle needs of exonerees and athletes. And as a former All Big Ten and American in soccer for Northwestern University, where he received his degree in economics before being drafted into the MLS by Real Salt Lake City, Oliver knows firsthand the unique financial needs

of his athletic brethren. So, too, does Cameron, a former Northwestern football player who serves as business development manager and financial advisor for athletes and leads the firm’s initiative for NFL players.

While Oliver’s skill and ambition have garnered him awards such as *Rising Leader* from Northwestern University Black Alumni and the *CDIS 2020 Congolese Rising Leader*, his commitment to the betterment of all extends beyond his career. He serves on the boards of the 100 Black Men of Chicago, Northwestern University Black Alumni Association, and 548 Capital. Like Oliver’s clients, this might be the greatest success story never told—until now. We sat down with Oliver to hear more about Aurélien Capital and his commitment to helping his unique clients pursue their life’s passions.

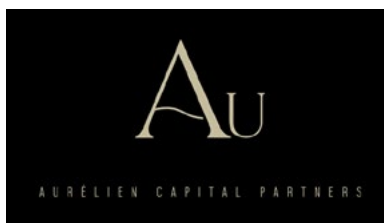
Q&A Let’s start at the beginning. What led you to a career as a financial advisor?

A: It was my mother and father who inspired me. I grew up in Detroit, but I was born and raised in Luxembourg. My parents are Congolese, and I witnessed their endless personal and financial sacrifices to take us from the Congo to Europe, and, finally, to the U.S. to give me and my sisters a life of opportunities. I wanted to help individuals like them, who, in the traditional sense, might not have access to or knowledge of the life-changing resources that wealth management provides. This is my mission that has guided me through my entire career, and especially with my own firm now.

The inspiration for Aurélien Capital Partners came from a meeting with a wrongly convicted exoneree, is that right?

A: Yes, it did, and I’ll never forget that day. His name was Jonathan Barr. He and his brother, James Harden, were part of the Dixmoor Five, who were falsely convicted of rape and murder and spent 19 years in prison before being exonerated. I was just starting at Merrill Lynch, and I met a CPA who did prison ministry and he asked me to meet him. We met at a Starbucks and talked for six hours, and he trusted me with their settlement. This was where the idea for Aurélien Capital was born. These individuals often have little or misguided assistance when it comes to their wealth once exonerated, and I was determined to help them.

We work directly with their attorneys at Neufeld, Scheck & Brustin (NSB), whose founders - Peter Neufeld and Barry Scheck, also founded the Innocence Project. We built a strong relationship with NSB and were privileged enough to become a preferred financial advisor for their exonerated clients. They started sending us more exonerees, and it snowballed from there.



How does your approach differ when working with exonerees?

A: On average, our group exonerees served 18 years before release and a combined 200+ years in prison. So when it comes to understanding money, wealth, finances, they're starting at the very beginning of financial literacy and more importantly the outside world has drastically changed. We're a big part of the process of helping them re-enter society and understanding what life means to them, who are the

We help clients manage their money to bridge that gap, maximizing every dollar they have now by providing investments that generate enough passive income and returns that can sustain them post playing career and well into retirement.

important people in their life, and what life goals they want to pursue with their newfound wealth and freedom. The first few years is just helping them get settled, feeling part of society again, and piecing every part of their financial life together, from their bank account, first house, first car, putting together a budget, and then financial planning, taxes, management, etc. Working with these individuals, building relationships with them, and seeing them flourish is so tremendously rewarding and fulfilling for us.

Will you share the success stories of a few of your exonerees?

A: There are so many, so it's difficult to pick just a few. Jonathan Barr is now thriving with a beautiful family and a sound financial plan to carry him through his life. Jamal Trulove is another. He spent eight years in San Quentin after being wrongfully convicted of murder. He was released 2016, and I remember taking him for his first steak in Chicago. He's a successful actor & entrepreneur now. Knowing that we were able to help him maneuver in business and facilitate his connections and that allowed him to star in an Oscar-nominated movie and in three upcoming films, and just seeing him shining in life, it's an awesome feeling.

How do you serve your athlete clients and how is their situation different from others?

A: I love this space because I was an athlete. I'm passionate about not only protecting their hard earned wealth, but making it work for them throughout their lives. The earning timeline for athletes is relatively short, and they essentially retire twice—from their sport usually in their late 20s, early 30s, and then again in their 50s and 60s—and this is where post-career planning is very different. We help them manage their money to bridge that gap, maximizing every dollar they have now by providing investments that generate enough passive income and returns that can sustain them post playing career and well into retirement.



How does your ability to access venture capital, private equity, and angel investments benefit your clients?

A: Our access allows us to help our clients get into unique, high-quality deals, and this is an area that we've quickly become known for among our athletes. Unlike traditional advisors, we help them get into proven private placements and venture capital offerings that help create generational wealth. We've connected with Silicon based angel firms and secondary investment banks that source tremendous investment opportunities for our athletes and all qualified clients. We mitigate the risk for our clients by investing in companies that have proven revenue and exit strategies and are disruptors in their industry. We utilize direct placements and institutional funds to get our clients access to pre-IPO tech stocks and private market acquisitions that typically exit within 1-3 years.

What do you enjoy most about your work?

What I enjoy most is seeing our clients thrive and succeed in life. But what really drives me is seeing the excitement and pride of our exonerees when they're flourishing. To be a witness to these moments is very emotional for me, and it's by far the proudest I've ever felt about our work.

CONTACT DETAILS REMOVED

Jennifer Arsenault

A 28-year financial industry veteran of Fortune 500 and publicly traded companies spanning from aerospace to telecommunications to energy, from UTC to Siemens to NextEra to Welltower, Jennifer Arsenault believes that success comes with authenticity—and as managing partner of Viper Equity Partners, she's the very embodiment of the power in this philosophy that has guided her entire career. It's this same ideal that underlies her work with the hundreds of clients that she's assisted with since joining Viper in 2017 in a role that focuses on client packaging, practice underwriting, and buyer inquiries, all while managing a staff. In her words: "I bring dream outcomes to reality by working closely with our doctor clients." It is this passion that drives her every day—and has contributed to the lightning-fast growth of Viper.

I've always wanted to make a positive change, and now I'm using my skills to do just that. I get tremendous fulfillment from my work with health care clients, and I feel so fortunate and blessed to be where I am today.

Coined the "Ritz Carlton of investment banking," Viper Equity Partners is a leading M&A investment firm offering full-service, seller-side support for doctors looking to partner with larger platforms or private partnerships. Founded in 2009 in Palm Beach, Florida, the company serves clients across the U.S., with a focus on dentistry, dermatology, and plastic surgery, and an eye on new verticals within the medical space. Named among the *Fastest Growing Companies of 2020* at the 10th Annual Best in Biz Awards, Viper has enjoyed significant growth in its deal inventory, which now exceeds \$700 million, with the goal of additional closed deals in excess of \$250 million by the end of 2021. Jennifer recently spoke with *The Top 100 Magazine* about Viper, her work, and her philosophy of authenticity.

Let's start with your current role and what attracted you to Viper.

In 2017, I made a huge jump from a large corporate environment to a specialized M&A investment banking platform when Viper recruited me to grow the firm to its current flourishing state. I was immediately attracted to assisting lucrative closing transactions for hard-working doctors in contrast to the enrichment of boards of directors and shareholders of large companies. My role allows for turning dreams into reality by offering support for doctors who have little experience in M&A. Although we're on the sell side, buyers love to work with us because we make their jobs so much easier. We collaborate with doctors and provide rigorous and sound financial assessments of their practices, including solid EBITDA calculations. My division of the firm offers thorough underwriting and packaging to facilitate value proposals that often pave the way for expedited offer presentations. For me, it's all about the human aspect. I've always wanted to make a positive

change, and now I'm using my skills to do just that. I get tremendous fulfillment from my work with health care clients, and I feel so fortunate and blessed to be where I am today.

To what do you attribute Viper's lightning-fast growth?

I think the secret to our success has been our ability to establish trust quickly and to remain relationship-focused on both ends of the transaction. We provide full-service support to our clients and foster excellent relationships within the industry. Since our clients specialize in health care, they're like fish out of water when it comes to M&A and equity transactions, so we are their advocates—bringing them all the way from packaging to the closing table. In addition, we do most of the homework for buyers who are evaluating these practices, by offering underwriting and packaging services. Overall, our goal is to bring them to a swift, efficient, and lucrative closing.

Have you seen an increase in M&A activity from medical practices and doctors as a result of the COVID pandemic?

Yes, we have. When a lot of companies were forced to shut down, we remained open and active with no slow-down in buyer appetite. Many doctors evaluated their situations and realized how much easier it would be to weather storms like COVID if they were partnered with larger platforms. Securing their futures financially, protecting their businesses, and taking care of their patients were likely brought to the forefronts of their minds as they sought to protect their empires. Also, if they're considering an exit strategy, partnering with a larger organization gives them peace of mind and, many times, a far more lucrative and elegant segue into the next chapter of their lives.

How does your unique perspective, experience, and financial acumen outside of M&A benefit your clients?

My previous roles—budgeting, forecasting, financial planning, and analysis—placed emphasis on both internal and external reporting. I was accustomed to communicating internally, messaging our board of directors for quarterly shareholder meetings, determining how we were performing compared to our financial targets, and then tweaking our strategy to improve financials or to better align our strategy with our goals. I crossed over into a lot of different areas throughout my career in



Viper Equity Partners

CONTACT DETAILS REMOVED

Managing Partner



“

I bring dream outcomes to reality by working closely with our doctor clients.” It is this passion that drives her every day—and has contributed to the lightning-fast growth of Viper.

”

finance, but the M&A space fits so much better with my personality. I’m not the typical “finance” person because I love to interact with people, and this role allows me to do just that. I can help clients reach their goals rather than just focus on numbers.

You place a tremendous amount of importance on authenticity. Why is this important to you?

I firmly believe that genuine strength and power come from the ability to be authentic in your daily life—whether at home with your family, friends, and community, or at work with your coworkers, clients, and partners. As a woman, embracing the fact that I have a different approach from others has also been incredibly empowering, and my clients can feel that, too. One of the reasons my partner, who is male, and I work so well together is because we have different perspectives and approaches, and this yin and yang serves

our clients well. Overall, exhibiting a strong emotional quotient (EQ) has benefitted me greatly—particularly in the world of M&A, where transaction values are high and so are emotions.

What advice would you give to young women entering the field of finance?

I’m incredibly fortunate to be part of a company that gives fantastic opportunities to all, regardless of gender. As a woman, it’s incredibly fulfilling to reach the highest levels of leadership in a flourishing firm. Viper is a tremendous place to work because we value the contributions of everyone and recognize the power of multiple perspectives and diversity. If I could give young women, or, really, anyone, a single piece of advice, it would be to understand that power and strength come in many forms: embrace your unique perspective; be true to yourself; and don’t feel the need to change who you are. At the end of the day, that’s really what empowerment is all about.

Jennifer holds a BS in finance from Bentley University and an MBA from the University of Miami.

Q&A

Nick Cantrell

With over 14 years of experience as a financial planner, Nick Cantrell, CFP®, ChFC®, CLU®, CSRIC™, brings an independent, holistic approach to planning and investing, with a specialization in helping clients to align their assets with their values. In fact, he is one of only a few hundred Chartered SRI Counselors in the nation and is one of only a handful of people who are also Certified Financial Planners™. After achieving such a rare combination of designations, it came as no surprise when *Forbes* named him a *Top Next-Gen Wealth Advisor* for three consecutive years (2017-2019). Then, in 2020, Nick founded his own company, Green Future Wealth Management—an independent financial services firm based in Worcester, MA with multiple offices throughout the region. Rather than focusing solely upon investing, as many sustainability focused advisors do, Nick delves deeper by exploring comprehensive financial planning, tax planning, charitable giving, risk management, and estate planning. Nick recently met with *The Top 100 Magazine* to tell us more about his company and the different services he offers.

Q: How did you become interested in finance and wealth management?

A: I was introduced to the industry by my father who is now in his mid-70s. He is still an active planner with his own independent firm, which is still taking on new clients. Growing up, I would help with the filing and any other small jobs he asked me to do, but I had no interest in following in his footsteps. Instead, I became a classical musician—a bassoonist. I taught music in the public schools but found that I wasn't able to scratch that entrepreneurial itch that I have always had. Financial planning was a natural choice for me to pivot to in my 20's because I found that I had a pretty deep base of knowledge from all those years working with my father.



Nick delves deeper by exploring comprehensive financial planning, tax planning, charitable giving, risk management, and estate planning.

Q: When did you get your start as a wealth advisor?

A: I started my career in 2007, about a year before the global financial crisis. I had to build my network because I was new to the business and had also just moved to a state where I didn't know anyone. I was 26 years old, with no experience and no clients just working hard every day trying to build my business. I found that the best way to grow my practice is by spending every day focused on helping others. Over the years, clients have introduced me to other clients who need help, who in turn have introduced me to others, which is how I have grown a practice of clients who are frequently introducing me to other people I can help. In 2020, I decided to leave the very large, multi-billion dollar firm I was affiliated with to launch Green Future Wealth Management, where I could really focus on my passions of sustainable investing and financial planning.

Q: Is there a story behind the name Green Future Wealth?

A: When I was launching my firm, my first inclination was to name it "Cantrell Financial." However, my brilliant wife hated the name because "the only thing it tells me about your company is what your last name is." Of course, she was right, so I spent some time thinking about who I was trying to help and how.



We are future focused—manifesting what we want financially and personally—so I wanted a name that referenced both the environment and sustainability while focusing on what is in front of us. My primary focus is on sustainability and wealth—creation, preservation, and stewardship—both financially and environmentally. Clients have really connected with the name, the logo, the website, and the bigger picture of building a “Green Future” for themselves.

Q: How much has the company grown over the past year?

A: There has already been a significant amount of growth. I am adding more people and we just moved into a new space after outgrowing our first office within the first year—despite starting out in the middle of a pandemic. It has been a tremendous undertaking because there’s an overwhelming demand, and I have people reaching out to me on a daily basis. I’ve also partnered with an estate planning attorney who works with a lot of art collectors and business owners, many of whom want to align their assets with their values, so there is quite a bit of synergy there. The ability for clients to access high end tax and estate planning right down the hall has been a real value add for my clients.

Q: What other types of clients do you serve?

A: I serve an extremely wide variety of people. When I founded Green Future, it was important to me that I not require a minimum asset threshold in order for clients to work with me. I believe deep down that the work that I do improves client’s lives, and I didn’t want to create barriers to clients receiving the help that they need. My goal is to help everyone build their wealth and improve their lives, although the services I provide to an investor who is just getting started or new to investing may look very different from a family who has tens of millions of dollars and has more complex tax, investment, and estate planning needs. In addition to artists, musicians, and writers, I serve quite a few academics and a fair number of business owners as well. A significant portion of my clients have inherited wealth and are really trying to navigate how to effectively manage their assets in a manner that is in harmony with their values, while also taking care of the bigger picture planning that is necessary when you have inherited wealth.

Q: It sounds like you’ve come a long way over the past 12 months. To what do you attribute Green Future’s growth?

A: First, there is an insatiable demand for the type of investment management and financial planning that I specialize in. It’s difficult for people to navigate comprehensive, sustainable wealth management by themselves, and they have a hard time finding qualified professionals with the expertise to assist. I think that I am one of the few advisors that regularly receive emails from prospective clients who have found me online and are reaching out to asking to become clients, simply based on the specialization and expertise I have in sustainable investing. Second, I continue to receive a ton of referrals from existing clients who are telling others about my approach and the different kinds of services I have to offer. I believe clients refer me to their friends and family because they are making investments that fit what matters most to them. Many people are thinking critically about issues such as environment and sustainability, racial injustice, gender inequities, LGBTQ rights, and many others. I help clients to manifest their values in their investments, charitable giving, and bigger picture financial planning and to see them incorporated into all the different aspects of their lives. Going forward, I am planning for continued growth and scaling to a regional and one day national presence. The goal is to be a household name when people think of sustainability and investing.

Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a broker dealer, member FINRA/SIPC. Advisory services offered through Cambridge Investment Research, a Registered Investment Adviser. Green Future Wealth Management and Cambridge are not affiliated.

Investing involves risk. Depending on the different types of investments there may be varying degrees of risk. Socially responsible investing does not guarantee any amount of success. Clients and prospective clients should be prepared to bear investment loss including loss of original principal.

Contact

CONTACT DETAILS REMOVED

James — Webster



CONTACT DETAILS REMOVED

Long Island native James Webster is a serial entrepreneur with more than two decades of financial services industry experience. Having developed a strong work ethic early in life, he began managing various sales floors at 18 years old, amassing knowledge in small business financing and payment processing. He then went on to learn the different facets of the mortgage industry by working on the residential side until 2007. Three years later, his innovative thinking and passion for helping small business owners led James to serve as co-founder and CEO of National Business Capital in New York. Over the next 10 years, the company would be ranked among the Top Places to Work in Long Island, and his team would help to secure over \$1 billion in financing for nearly 100,000 small businesses nationwide. Today, James is the Founder and CEO of ROK Financial; a New York-based financial lending institution focused on commercial capital and small business financing options.

Launched in July 2020, ROK Financial took off at a lightning-fast pace, filling with immediate demand for commercial

financing products ranging between \$25,000 and \$10 million. ROK offers a wide variety of products and services including SBA loans, equipment financing, small business term loans and much more, with direct access to the top fintech and commercial lenders in the nation. The team is currently averaging 400 transactions per month, resulting in hundreds of millions of dollars distributed to small businesses on a monthly basis. "Small businesses are the heartbeat of the nation and have shaped the country that we are today. We're happy to see that our streamlined process, revolutionary technology, and knowledgeable team of experts are empowering them to create new opportunities to thrive," says Webster.

In the spring of 2021, James's desire to help people compelled him to launch a new franchise-like arm of ROK—the Remote Sales and Education Platform—a model designed to create business opportunities for individuals. The platform is an extension of ROK's sales team and is designed to help anyone in the country interested in joining the commercial finance industry. "Any person who starts a new career needs education, training, support, and technology, so we wrapped it all into one portal that integrates with our CRM system," Webster explains. The platform serves a vast range of participants—from those just entering the industry to seasoned individuals looking to further their careers with a best-in-class education and support provider in the commercial capital industry. With over 70 training videos in the portal as well as weekly and monthly live classes online, the response has been overwhelming. Hundreds of applicants nationwide have responded, and many have already joined the platform since launch. "We've been super successful in helping small businesses; now I want to take my experience to help individuals do the same. I'm helping the small business community and helping individuals who want a better lifestyle and work/life balance, and do something that's meaningful for them," Webster says.

The business advisors joining the remote platform hold the same responsibilities as the internal sales teams. Both groups build out a network of partners and deal directly with clients seeking capital. They work closely with those clients to discuss their business needs and submit their documents for approval. "The outside team also has access to the same technology we have built and are using internally. They have a portal for education, training as well as submitting and working their deals in the CRM system. By leveraging our proprietary technology, applications and statements are run through OCR software, Credits are automatically pulled, and the clients are best matched with our vast network of lenders and programs, all within a matter of minutes. This allows us to get the best possible outcome in the fastest possible timing for our clients and their businesses," Webster explains. "Clients will benefit from the system's speed, ease of use, and constant communication with team members throughout the process. "Many people are looking for a work from home solution and work/life balance with flexible schedules especially now, so we are meeting the growing demand for contracted workers while continuing to provide the high-touch, high-quality service to our clients that we're known for," says Webster.

In addition to his role at ROK, James owns two other businesses in Long Island, James is also a real estate and business investor. As well, James serves as co-chairman of the Small Business Financing Association Broker Council.

Sean Kelly

CEO

In 2008, Red Rock Secured, a gold and silver investment firm offering people a physical alternative for retirement savings based in Los Angeles and El Segundo, California, was a small business with only one office. Today, with Sean Kelly as its CEO, the company has grown to the point of NASCAR sponsorships and features in *Forbes* magazine, and with clients in all 50 states. "I've found that the more we focus on the client, the more successful we become," Sean says.



Sean's experience in the financial industry stretches back to 2003, and he's worked with top traders developing software systems to help clients know the best times to enter and exit their trade. Prior to 2008, Red Rock Secured was still a

financial services firm, but when the recession hit that year, causing so many people to lose money and leaving them stressed about how to plan for the future, Sean and his team knew they had to provide a solution that prevented this in the future. In response, they refocused, and made client asset protection their primary focus. To ensure that money will not be lost regardless of market activity, Red Rock converts clients' money into physical gold and silver, as well as platinum and palladium, assets that can never get to zero, thus providing them with a more secure alternative to other retirement plans.

Today, Sean and Red Rock Secured's primary focus is being as valuable as possible. "Anywhere we can help the client is a focus," he says. "We want to have as much to offer a client as absolutely possible before we earn the right to have their business." To that end, they have evergreen promotional offers for clients up front, and provide 100% free shipping and insurance until the clients take possession of the metals.

And it's not just the clients that Sean is proud to take care of. Red Rock Secured creates multiple opportunities for their employees, and serve as their employees' top advocate. Sean himself works hard to create a positive and welcoming environment that creates a healthy and vibrant culture, which in turn creates a great experience for clients. "If you have happy employees, it translates to the way they treat clients," he says. And it's been working. Sean is extremely proud of the positive reviews his firm has earned with employees on sites like Glassdoor. "You see a difference when people are truly happy at work." In addition, Sean is proud to be part of a veteran-led company, with employees coming from backgrounds in all four military branches. He's also excited about the upcoming opening of Red Rock Secured offices in Spokane, Washington, and Newtown, Connecticut.

When he's not helping his employees and clients, Sean enjoys spending time with his family, which includes three children, and works with organization K9s for Warriors, which provides service dogs for veterans in need.



CONTACT DETAILS REMOVED



Howard

Chi

At the tender age of five, California native Howard Chi embarked on his first trip to Sea World and instantly developed a lifelong love for animals. Eventually, that same sense of compassion and the desire to help others would impact his life as an adult. Howard grew up to build a successful career, leading multimillion-dollar brands and startups with a focus on fiscal policy, key performance metrics, and a continued improvement process. For more than 20 years, numerous organizations benefited from his leadership and strategy in turn-around scenarios, M&As, and growth initiatives, but it was in 2017 that he received the opportunity he'd been waiting for—a chance to make a difference in the world by helping to save millions of animals.

A recruiter from the San Francisco Society for Prevention of Cruelty to Animals (SF SPCA) called to explain that they were struggling financially, losing money every year, and offered him the position as CFO if he were willing to help. Howard accepted and remarkably turned the organization around within 12 months. In 2021, he became COO, and under his leadership, SF SPCA now holds more liquid assets than it has had in 153 years. However, because the nonprofit is not affiliated with any national organizations, it relies upon charitable giving to continue providing care and protection for animals in need. Financial planners, in particular, are the at forefront of their philanthropic community when they incorporate non-profits such as the SF SPCA into estate plans. “Whether clients choose to give to the SF SPCA throughout their lifetime or beyond, their gift ensures their passion and commitment to animals for years to come,” says Howard.

As COO, Howard oversees all areas of SF SPCA's finance, supply chain, purchasing, facility operations, IT, and multilocation hospitals. He also sets goals for performance and growth, drives the organization's financial planning, and designs and implements organizational strategies, plans, and procedures. Howard has been delighted to see the increase in donations each year as well as the rise in pet ownership. “We receive about \$20 million annually from individual legacy plans, and the number is growing,” he says. “I believe we're going to see an increasing number of financial advisors including SPCA as a philanthropic option when working with people on their legacy plans.” Many celebrities and other high-net-worth individuals are also jumping on board—leaving hundreds of millions of dollars to their pets and giving to animal organizations. Gail Posner, Oprah Winfrey, Mary Tyler Moore, Ted Danson, Drew Barrymore, Glenn Close, Debra Messing, and countless others are bestowing significant support to animal welfare organizations like the San Francisco SPCA.

In addition to donations, an increase in pet adoptions occurred during COVID when people found themselves at home and in need of companionship. “Statistics have proven that we benefit from human-animal bonds, so when we adopt a pet, we're not only saving the animals' lives; we're saving our own,” Howard explains. Many people treat their pets like family members, including them in their legacy planning along with their children. Howard's own family can relate, as they recently adopted a giant malamute husky mix—named Bear by his two daughters. “The name fits because she is as sweet as a berry,” he quips.



SAN FRANCISCO
SPCA

Prior to his current role, as co-founder of Pluris Financial Group, Howard spearheaded the merger with a national organization and went on to join the nonprofit sector. Howard's guidance has helped many organizations including turning around a struggling, 65-year-old nonprofit healthcare organization—from \$7 million to \$40 million in 36 months.

Howard in collaboration with University of California Davis recently drafted the budget entitled California for All Dogs and Cats, in Governor Gavin Newsom's most recent state budget. The Budget includes an increase of \$50 million one-time General Fund for the University of California Davis Koret Shelter Medicine Program to develop a grant program for animal shelters. Howard is also the author of a book detailing how to successfully assist and manage nonprofits called *Nonprofit Financial Health*, which was published in 2020. “I'm able to lend a combination of successful startup experience and solid organization to give nonprofits a structure to carry on,” says Howard. “This allows them to pursue their missions without having to chase the dollar.”

Howard holds a bachelor's degree in economic administration from the University of California, Riverside, an MBA from Golden Gate University and serves on the Board of Directors for the Zuckerberg San Francisco General Hospital Foundation.

CONTACT DETAILS REMOVED

JOHN BRICK

CHIEF INFORMATION OFFICER



There is nothing John Brick can't do for his clients at Kruse Asset Management in Chicago, a boutique registered investment advisor (RIA) offering comprehensive wealth planning and asset management services. He has more than a decade of experience in finance and asset management and a career marked by appearances on *CNBC* and features in *Reuters* and a host of other media. Now, as the chief investment officer for Kruse, he brings it all together to manage investment portfolios valued at nearly \$100 million, helping them evolve so that clients can focus on the things they love to do without worry. He describes his work as being each client's "personal CFO," steering their finances in the best possible direction. "What I enjoy most is working closely with my clients, and learning about them and their goals, and then helping them develop a plan to realize the future that they envision," John says.

John joined Kruse Asset Management at the start of 2021 and uses his expertise to help clients by making advantageous changes to their portfolios, keeping them abreast of market changes, and striking the best balance between risk and return. His uniquely broad background from working at a hedge fund, private equity funds, helping to run an RIA, and recently closing venture capital deals allows him to help people navigate tax law changes, stay ahead of the curve on estate planning, and take advantage of myriad investment options. In addition, John's experience as a sell-side analyst, which saw him writing reports (Morningstar and Stephens Inc.) and meeting with company management teams, is something that helps him work with clients at Kruse. "I have a better ability to dial into the risk/reward metric given that experience, and I have an ability to enhance the risk profile," he says. "This gives me the upper hand when I look at investment opportunities (mainly stocks) for my clients to consider. Having gotten into the deep analysis of companies required to write reports, I can see the minute details of not only a given company, but an industry."

John has also developed a creative structured notes business after partnering with the high-profile Fintech platform, Halo Investing, a unique and powerful platform available to financial advisors. Utilizing Halo's differentiated tools allows John to generate a targeted 10%+ income annually, and he's one of the few advisors to offer the products, much to his clients' benefit. "It's the \$3 trillion market opportunity no one's ever heard of and we're taking full advantage via Halo," he says. For fixed-income clients as well as equities, John handles asset management to yield enhanced returns for clients



“Taking all my skills and experience and using it to design a blueprint for someone's future is what gets me out of bed every day.”

using his considerable expertise. In addition, his venture capital experience allows him to work with company clients, as well, and dig deep into a business's strengths, needs, and goals. And when it comes to planning for the future, John has his individual clients covered, too, thanks to his estate planning services, which include tax planning, retirement planning, complex option strategies, alternative assets, venture capital insurance, and much more.

Despite all he knows and all he does, however, John prefers to stay humble. "I hate talking about myself," he says. But his multifaceted, well-rounded background in finance speaks for itself—as do the thousands of clients he's helped over the years—and he's dedicated to bringing integrity, honesty, and sensitivity to every client. "I strive to bring trust and loyalty to all my jobs and responsibilities. In any client relationship, it is important to handle day-to-day things. When times are tough, being good with people and having empathy separates me from others," he explains. "Taking all my skills and experience and using it to design a blueprint for someone's future is what gets me out of bed every day. This is where my passion lies."

CONTACT DETAILS REMOVED



Scott G. Aitken

With more than 14 years of experience in banking and wealth management, Scott G. Aitken is driven by the desire to help his clients achieve their hopes, goals, and retirement dreams. It is this passion for those he serves combined with his financial ingenuity that saw him ranked among the top 10% of all advisors at JPMorgan in 2017 and 2018 based on revenue production. Now, as a wealth management advisor for Wilde Wealth Management, he delivers that same recipe to help people transition confidently and securely into their retiring years. Scott joined the firm in 2019, after a 12-year tenure as a private client advisor with JPMorgan in both Arizona and New York City, so that he could provide his clients more time, attention, and personalized services. “I wanted the freedom to be able to do more and offer more services for my clients. Because we are a boutique financial planning firm, I can work more closely with my clients and with our strategic partners,” Scott says.

Based in Arizona, Wilde Wealth Management Group focuses on all aspects of the financial planning process—tax, insurance, estate, retirement, and investment planning as well as wealth management. Since its founding nearly 30 years ago, the company has seen tremendous growth through both client and



advisor acquisition. Along with its headquarters in Scottsdale, the group has expanded its offices to serve clients in Tempe, Glendale, Tucson, and Payson. For the past 12 consecutive years, *Barron's Magazine* has ranked Wilde Wealth Management among the *Top 1,200 Advisors in the Nation* as well as one of the *Top 25 in Arizona*. Most recently, in 2020, Wilde Wealth Management Group received their highest honor to date when the magazine named them the *#1 Financial Advisor* in the state.

As a wealth management advisor, Scott specializes in retirement readiness assessments and comprehensive asset allocation analysis. His primary focus is on long-term financial planning for his clients—guiding them through the transition between their working years and retirement, with an emphasis on retirement income planning and wealth management. He also works closely with his in-house strategic partners to help people with strategic tax planning as well as comprehensive estate planning. Scott's close relationships with his clients allows him to build customized financial plans and individualized investment portfolios that are in line with each person's unique goals. “Since every person is different, the way people invest should be tailored to their specific situations with no two financial plans being alike,” he explains.

But Scott's attention does not cease once a solid plan or portfolio is built. He continues to work with his clients throughout the financial planning process, examining myriad strategies and options to help them adjust according to their current needs and future goals. “I always look at their risk exposure, because they can take on more risk and contribute more to their accounts while they're working; however, once they retire, they not only stop contributing, but many also live off the assets they've accumulated or use those assets to subsidize their income,” he says.

For Scott, the best part of the job is getting to know his clients—what they are passionate about, what they've worked hard to accomplish, and what dreams they have for retirement. “Talking with people about their life's savings, cares, and concerns is very personal, but through all those conversations and years of working together, a deep level of trust and mutual respect is built between us,” he explains. “At the end of the day, my job is to make sure that my clients have a successful retirement without ever having to worry about running out of money. They can sleep peacefully at night, and you can't put a price on that.”

In addition to his Series 7 and 66 registrations, Scott is an Accredited Investment Fiduciary designee (AIF®).

Securities and advisory services offered through Cetera Advisors LLC, Member FINRA/SIPC, a broker/dealer and a Registered Investment Advisor. Cetera is under separate ownership from any other named entity.

Barron's Top 1200 Advisors (award recipient Trevor Wilde): Listing in this publication is not a guarantee of future performance or success. Over 4,000 advisors who wish to be ranked fill out a 102-question survey about their practice, data is verified and then applied to a ranking formula. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms, and the quality of the advisor's practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor. Listing in this publication and/or award is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the advisor by any client.

CONTACT DETAILS REMOVED

LEANNE MYLES

Associate Mortgage Broker



I'm all about helping people and navigating the financial world is often a challenge.

Last year, Leanne Myles placed in the *Top 10 Performing Mortgage Brokers* in Canada, after working with Clinton Wilkins Mortgage Team in Dartmouth, Nova Scotia, for just two years. This year, she smashed that record by winning a spot in the *Top 5 Performers* with \$40 million in closed deals. In fact, she placed second for her Manulife Insurance sales, being shy of the top spot by just one deal! Leanne attributes this jump to her joining the team and of her willingness to adapt to new processes. Even before being named a top performer, Leanne was a formidable mortgage broker; she was a finalist for the *Best Alternative Lending Mortgage Broker* in 2017 and won the *Women in the Mortgage Industry's Inspiration Award* in 2018.



CENTUM®
Home Lenders Ltd.
CLINTON WILKINS
MORTGAGE TEAM

Leanne has been in the mortgage industry for 15 years, working her way to the top of one of Canada's largest banks in 2013. However, she found she was most interested in helping the people who needed it the most, people who were facing financial struggles. "I'm all about helping people and navigating the financial world is often a challenge," she says. "Most people only know regular banks. They go to banks and find they don't qualify,

but brokers have access to over 40 lenders and can often make things work that banks can't." In 2013, Leanne transitioned to being a broker and it was not without its challenges. "I fell flat on my face, but I learned a lot!" she says. After working for five years as an independent broker with a large brokerage, she moved to Clinton Wilkins, where she learned fast and rapidly increased her sales, jumping from \$12 million to \$22 million to \$40 million, and is on track to do \$60 million in the coming year. Today, Leanne works on the Clinton Wilkins mortgage team with Clinton Wilkins, also a top-producer, under the umbrella company of Centum Home Lenders.

Leanne's client base includes people who have been through hard times and major life events. She helps them improve their credit and gets mortgages for people who might not otherwise be approved, and her personal, relationship-based approach keeps clients feeling secure and coming back. And Leanne can relate to the anxiety of financial hardship; in 2011, her husband lost his health benefits and the couple faced financial difficulty. "It was eye-opening what happens to people when health and income is lost," she says. The experience inspired her to be a broker for those in similar positions and give them the help, security, and hope that she needed during her own hard time. One of her proudest moments was helping a couple avoid homelessness by securing them a mortgage that a bank would have denied them, allowing them to buy a house and secure their future. Taking on clients' challenges to improve their lives is Leanne's passion. As she says, "If Leanne can't get your mortgage done, no one can!"

CONTACT

CONTACT DETAILS REMOVED



Michael Kettner

Director of Investments

Earning a CFA charter and an MBA from Vanderbilt University after years at the New York Stock Exchange and financial giants like Merrill Lynch, JP Morgan, and Citibank, Michael Kettner's background and experience is inarguably impressive. Today, he's taking his expertise and applying it on behalf of clients of Coastline Wealth Management in Port Jefferson, New York. This independent financial planning and wealth management firm employs people with numerous specializations and when a client needs help with managing their investments, they come to Michael. He and his team create portfolios and develop strategies tailored to the unique needs of each client. Since joining Coastline in 2014, Michael has seen the company grow from \$60 million under management to over \$1 billion,

with Michael responsible for managing more than \$400 million in discretionary accounts. Thanks to people like Michael, Coastline enjoys a growing number of new relationships and fantastic client retention.

Michael's educational background puts him at a distinct advantage in his field. His mantra, "always be learning," means he not only knows the ins and outs of investments but can explain it all to clients in an accessible, approachable way. "It's institutional experience and knowledge in a place where people don't normally have access to that," he says. Financial literacy can be a steep hurdle for some and to have someone like Michael, who can break it down, is incredibly helpful for those looking to manage and build their wealth for their families. In addition, his experience with the NYSE helps him understand buying and selling of stocks that clients can use to their advantage, too, and he stays up to date on the latest in finances by constantly reading investment news and periodicals. "My greatest source of excitement in life is to be informed enough to truly appreciate what happens next," he says.

“ I propose to sail ahead. For to reach a port, we must sail—sail, not tie at anchor—sail, not drift.” - FDR

Before coming to Coastline, Michael was a Hofstra University graduate working on Wall Street, trading equities with Merrill Lynch. As the business world began to drastically change, he went back to school to earn an MBA at Vanderbilt University. This more formal business education allowed him to rejoin Merrill Lynch doing high-level institutional projects before transitioning into private banking with JPMorgan, where he worked with ultra-high-net-worth clients. His quest to find a firm that shared his priority to provide unconflicted and inexpensive advice and service took him first back to Merrill Lynch, then to Citibank, and, finally, to Coastline. Working with a collection of institutions in a variety of roles gave him just the experience he needed to provide expert independent advice in his current role. Combining the wisdom of history with an open mind is essential to success in the sometimes complex and risky investment world.



Contact

CONTACT DETAILS REMOVED

Gage Arnold

“ For me, there is true satisfaction that comes from giving peace of mind to a family heading into retirement to know they are going to be ok!

In 2013, at 22 years old, Gage Arnold began his career with New York Life and Eagle Strategies, a wholly owned subsidiary of New York Life and registered investment advisor. After building a modest practice of his own for 2 years, Gage became a partner with the firm and today, at 30, he is responsible for the growth and success of a team of highly qualified agents and financial advisors at the New York Life and Eagle Strategies office in Tysons Corner, Virginia.

Transitioning into leadership was a natural move, given Gage's passion for empowering others to achieve their career goals. To this day, he maintains an enviable agenda of recruiting, training, developing, and retaining insurance agents and financial advisors in their personal pursuits of building their own practices. While he is often lauded for his leadership and consistent team growth, Gage credits his success to humble beginnings paired with the faith of senior leadership. "There's nothing special about me. My family taught me to take pride in my work, and my mentor always encouraged me to be crazy enough to believe I can accomplish anything," Gage shares. "I know I'm not the best in my field, but dedication and persistence has consistently pushed me to learn and grow after successes and failures." Gage instills this same belief in his team that with the right drive and ambition, they can overcome any obstacle and accomplish any goal.



It is this humility, complemented with his 'lead-by-example' management style that both clients and colleagues find so impressive. Gage's team further distinguishes themselves locally amid a highly competitive landscape through a unique approach, which focuses more on middle-income families than high-net-worth individuals. Having witnessed both of his parents' financial hardships, Gage grew an appreciation for financial security and the impact that his work can have on families like his own. He adds, "For me, there is true satisfaction that comes from giving peace of mind to a family heading into retirement to know they are going to be ok!"

Gage is a credentialed financial advisor with both Series 7 and Series 66 licenses, as well as a Series 24 licensed Registered Principle and is pursuing his first designation with the American College as a Chartered Leadership Fellow. When he isn't leading his team of agents and advisors to new heights, Gage enjoys staying active through recreational sports such as soccer and basketball, participation in local charitable organizations, and remodeling projects on his home in Alexandria, Virginia.

Eagle
Strategies
LLC



CONTACT

CONTACT DETAILS REMOVED

Nihad McBride

CEO & Founder



A successful entrepreneur and CEO with multiple careers in corporate finance, risk management, and business transformation, Nihad McBride is the founder and CEO of Acquence Solutions Inc., a boutique consulting firm based in Vancouver. Nihad and her team have been helping clients develop organizations and transform businesses in North America, Europe, Australia, and Africa for the last two decades.

Nihad, adaptable and strategic, successfully delivered a multifaceted amalgamation project for a multi-billion dollar organization in the financial services industry but laying off associates set her on a different journey. She founded Acquence Solutions Inc., building on a solid career in finance; it wasn't difficult for her to pivot to business transformation. Nihad's passion is building strong organizations that can withstand change. "If a company has the right people, strategy, and processes, it will not succumb to economic downturns," Nihad explains. Her focus is on developing leaders and empowering teams so they can build stronger organizations.

Re-establishing her career in North America was her third time reinventing and expanding her network. Nihad cut

her teeth working for the global oil and gas Fortune 500, where she learned extraordinary finance skills. She facilitated joint ventures and pierced barriers to entry for the oil and gas industry in the U.K., Namibia, and the Democratic Republic of Congo. She leads teams to the finish line, whether tackling different industries or launching new services.

Consulting and solving challenges in organizational strategy, optimizing talent, and contributing to the community are some of Nihad's most valuable personas. Shortly after relocating to Vancouver, she mentored women who needed to re-enter the workforce, newcomers, and single mothers by helping create pathways to leadership. Mentoring and coaching are always a priority for Nihad, whether in the workplace or to support a not-for-profit organization.

Nihad refined her approach to business transformation, helping boards and senior executives improve their governance, risk management practices, and risk profiles. The exposure to so many different areas, clients, people, and organizations in four continents equipped her with the confidence and the knowledge to shift to her current niche—organizational excellence.

Nihad and her team have been helping clients develop organizations and transform businesses in North America, Europe, Australia, and Africa for the last two decades.

"To successfully deliver strategic change, one must uncover areas of misalignments," Nihad explains. The shift occurred after helping organizations expand internationally, execute turnarounds, investigations, and amalgamations. For example, suppose she is hired by a CEO who says the company has a great strategy with limited delivery and execution. In that case, Nihad will strive to partner with her clients to ensure the company culture, structure, and talent align with the vision and the strategic goals.

Nihad focuses specifically on empowering leaders by helping them understand each employee's unique needs and inner strengths and getting them pulling in the same direction. At the core of Nihad's approach is simplifying decision-making and improving communication to ensure agility and adaptability. As part of her toolkit, Nihad leverages a solution initially developed for the U.S. Airforce in the 1940s. This scientifically validated tool leverages 60 years of data to provide reliable and actionable insights and position people and organizations for success. Since being certified in psychometrics in 2018, Nihad has been increasingly successful in building winning teams. Culture, values, diversity, and equity are central to her approach as she partners with her clients to design talent strategies to realize their vision.

Nihad is a highly adaptable expert who can pivot on a dime and a leader who is unafraid to tackle new industries and adopt innovative services. Her commitment to helping people, entrepreneurs, organizations is at the core of her professional journey. If anyone knows how to transform organizations and their people seamlessly, it's Nihad.

Contact

CONTACT DETAILS REMOVED

Noah Berkson

Managing Partner

Noah Berkson was only a freshman in college when he started his own software company, eventually moving from Iowa to Chicago to foster its growth. After selling out of the startup, he was ready to do more. His next ventures included Doc And I, which helped indigent patient populations get access to affordable prescriptions; Site, a property assessment company that used drones to survey properties for commercial clients; and DevBase, a technical staffing firm that places global tech talent with companies from Fortune 500 to venture backed start-ups.

Eventually, Noah became a startup investor and advisor, investing in early-stage companies. He ran the EO Accelerator on their Chicago board, helping small companies reach their first million, and it was in helping these startups that he began to notice something. “While investing and dealing with technology startups, we realized a lot of these early-stage companies had a gap,” he says. “They have a hard time finding and properly screening technical talent, which makes the building process difficult and the chances of failure exponentially higher. We saw this gap and realized our technical expertise and network were just as valuable as our money.” It was then, along with partners Peter Larsen and Raul Henriquez, that Noah founded Candor Ventures.

Candor Ventures is a venture studio and fund with locations in Chicago, Los Angeles, and New York, that invests in early-stage, technology-centric companies. The partners are investing their own money, instead of relying on outside capital. Taking an agnostic approach, they work with tech companies in many diverse fields, including fintech, agriculture, healthcare, and more. Launched in early 2020, they maintained their investments through the COVID-19 pandemic, when many other firms were refraining from deploying capital. Noah instead, chose to see it as an opportunity for Candor. “It allowed us to get a crazy amount of inbound deal flow,” he says. “We were also able to help a lot of companies that otherwise wouldn’t have survived.” To date, Candor has invested in 17 companies with one exit in their first 18 months of operation. “We put capital in, but also help dictate the outcome of the companies we get involved in,” Noah says. “We’re very hands-on and drastically improve go-to-market speed with a proven process.”



“ We put capital in, but also help dictate the outcome of the companies we get involved in. We’re very hands-on and drastically improve go-to-market speed with a proven process.

Noah and his team determine a company’s needs and then invest accordingly, making sure the companies have a predictable cost of technology. In addition, Candor supplies them with resources, including personnel such as software engineers, and works closely with each portfolio company to ensure success.

Though he is young, Noah’s entrepreneurial experience is already vast. He’s on the global board of Entrepreneurs Organization, which allows him to connect with business leaders from more than 50 countries and allows Candor to source deal flow from the world over, which in turn, helps more businesses grow and thrive. Noah is also part of Austin Capital, a single family office, focused on fintech and the next generation of banking. Noah’s goal for Candor is to invest in another 30 to 40 companies over the next two years, making Candor Ventures one of the largest venture studios in the U.S. “We want to be the premier place for entrepreneurs to come when they want to start or grow a business,” he says.



CONTACT

CONTACT DETAILS REMOVED



Jacqueline Garol

Jacqueline Garol joined Edward Jones in 2010 as a financial advisor driven by the desire to make a difference in people's lives—and her unwavering commitment to do so has set her clients, her community, and her career on an upward trajectory. In 2019, as the leader of her own office in Reno, Nevada, Jacqueline was named a limited partner of the firm. The combination of her experience gained from 15 years in the field and her team's dedication to those they serve have culminated in a host of client service excellence awards and honors. Jacqueline's intrinsic reward is in giving back to the firm, and in helping new financial advisors as a mentor, field trainer, hiring team member, and host office for new financial advisors. But underlying it all is the profound responsibility she feels to her clients.

Jacqueline provides financial solutions for a select group of families, retirees, corporate executives, business owners, and nonprofit organizations across the nation, often collaborating with their attorneys, CPAs, spouses, and other parties. "My guidance is tailored to support our client's current lifestyle, retirement income needs, and legacy goals, while making each client feel comfortable along the journey. The north star for us is on guiding them to achieve their long-term financial objectives with transparency and a disciplined investment process."

Jacqueline runs her office with two administrators and, of course, the support of the entire Edward Jones team of 5,000 professionals. "In a digital world we can stay connected while keeping it

personal. Each client talks to me or my administrators, Sarah and Heather. When clients call, they talk to somebody they know. No 1-800 numbers. No pressing 1-2-3 to get through. Just a friendly, familiar voice ready to assist."

Jacqueline and her branch office administrators work together seamlessly to serve their clients, making sure everyone knows what's going on in their lives. "If someone's about to be a grandparent, we discuss their goals—do they want to include their grandchildren in their financial plans? It also lets us celebrate with them. They're excited, we're excited, and we want to cheer those special life moments with them as well as ensure their financial successes."

An analytic by nature, Jacqueline revels in the challenge of developing high net-worth strategies for multigenerational families and businesses. "You've got not only the business owners and their financial wellbeing, but considerations about the longevity of the business plan. Depending on the owner's retirement plan—selling, handing it down, or breathing/living it because it's their passion—the elements need to align. Whatever is important for the client is important for us to know so that we can partner with them to act in their best interests in accord with their wishes."

“ My guidance is tailored to support our client's current lifestyle, retirement income needs, and legacy goals, while making each client feel comfortable along the journey. The north star for us is on guiding them to achieve their long-term financial objectives with transparency and a disciplined investment process.

Jacqueline's passion for helping people is equal only to her love of numbers and examining the myriad elements that play a role in adding value to her clients' lives. "I'm a puzzle master, and I have to put the different pieces of the puzzle together and know what financial spigots to turn on at the correct time—whether social security or pension or another revenue source." While she's focused professionally on helping them reach their goals, she's also emotionally invested in their success. "I understand what's going on in their lives, what's important to them, and I'm able to personalize strategies for them based on what they care most about, and the legacy they hope to leave."

Despite the litany of industry and business awards that would be the envy of most business leaders, it is the accolades from her clients that she holds most dear—with overwhelmingly positive ratings for experience and satisfaction that have set Jacqueline's office in the firm's top percentages. "I know I have done my job well when I am welcomed into my clients' lives as if I were family."

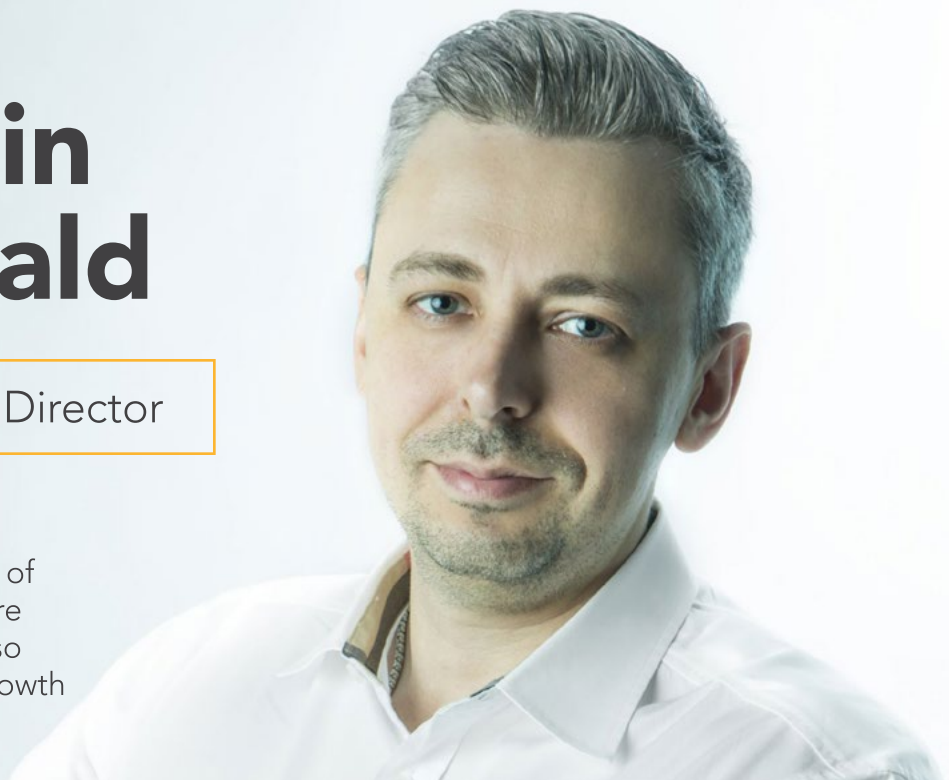
Edward Jones

CONTACT DETAILS REMOVED

Konstantin Lichtenwald

Founder & Managing Director

“Our specialty is finding the unicorns within the millions of businesses that are out there and bringing them to the public, so everyone can participate in the growth of these businesses.



When he founded Zeus Capital, LTD and co founded reverse-takeovers.com/, in 2019, Konstantin Lichtenwald brought 15 years of finance and accounting experience, including corporate compliance and financial management, as well as experiences with firms like Ernst & Young, to his new endeavor. Today, with Konstantin as managing director, the Vancouver, British Columbia-based firm has clients the world over, as well as satellite offices in Singapore and Germany. Zeus Capital provides corporate finance advisory, merger and acquisition services, and IPO/RTO advisory services, with a “one-stop shop” goal for their clients. That means that every step of the process is done in-house with the Zeus team, from pinpointing opportunities to structure planning and going-public strategies, to the eventual exit strategy and anything and everything in between. They also have a wide network of partners in adjacent fields to provide consultations for legal, tax, and banking issues.

Konstantin, a Canadian CPA and an ACCA in the U.K., also obtained his exempt market dealer license from the BC Securities Commission and is successfully established in Canadian capital markets. These designations allow him a deep well of knowledge of markets in Canada and beyond, which he draws on to best help private companies go public. In addition to the financial advisory, merger and acquisition, consulting, and capital market services, Konstantin’s team takes these companies public on North American stock exchanges, guiding them through the entire IPO or reverse takeover process, and guiding their management on how to run a public company. “The IPO process is a very long, sometimes painful procedure,

with a lot of hoops you have to jump through,” Konstantin says. “You have to be dedicated and persistent on behalf of your clients to guide them through all of the complexities. We are very involved with our clients’ businesses and work very closely with them every step of the way.” The firm’s main market, when taking companies public, is a primary listing in Canada and then a dual listing in the U.S., as well as a dual listing in Europe, particularly Germany. Dual listings are a unique specialty offered by Zeus and something not commonly offered by other firms.

Konstantin has found success thanks to his dedication, persistence, and hands-on approach—and so, too, have his clients across the globe. He uses his years of experience and expertise to find businesses that the market will welcome and works out the best approach to bring these companies public and become listed on stock exchanges. “Our specialty is finding the unicorns within the millions of businesses that are out there and bringing them to the public, so everyone can participate in the growth of these businesses,” he says. At the end of the process, these companies are not only participating in the stock market, but also open to major growth and evolution. “Being a part of their success is what I love most,” Konstantin says. “This is what drives me.”



ZEUS CAPITAL LTD.

CONTACT DETAILS REMOVED



ROBERT G. YOUNG



Robert G. Young set his sights on a career in finance in high school, taking all the accounting courses available to him. However, he never dreamed that his passion for the field would take him to a leadership role in one of the most respected and well-known nonprofit organizations in the world. “I didn’t know all that it would take to get here, and the thought of being a CFO never occurred to me back then, but I knew I loved numbers and this field.” After a 20+-year career that included roles as a controller for the ASPCA, vice president of the Environmental Defense Fund, and an auditor for Quest Diagnostics and KPMG, in 2020, Robert assumed the role of CFO for the National Geographic Society. He leads a 25-person finance department, manages cash flow and forecasting, maintaining the ledger, and preparing monthly statements, and partners with senior management to determine the strategy and operations of the organization.

Headquartered in Washington, D.C., the National Geographic Society is a global nonprofit that uses the power of science, exploration, education, and storytelling to illuminate and protect the wonder of our world. For Robert, helping the philanthropic mission of the Society is what drives him every day. “While I enjoy the financial aspect of it, to know that I’m contributing to an organization that’s helping to make the world a better place is tremendously rewarding,” he says. Robert approaches his work with the same determination that got him where he is today. “I had to put myself through school, working during the day and taking classes at night, all while caring for my family,” he says. “In my role here, I use that same drive and determination to help the organization continue its noble work.”

Robert is a lifetime member of the National Association of Black Accountants and past president of its Northern New Jersey chapter, where he currently resides. He’s also a member of the American Institute of CPAs, the New Jersey Society of Certified Public Accountants, and the National Society of Black Certified Public Accountants.

CONTACT DETAILS REMOVED



EMILY METZLER



Emily Metzler has been working with MuniCap for 13 years, starting just after she graduated, and is proud to see how much she has grown right alongside her company, from her

early days to her current role as senior vice president and CCO, and from the company’s early days with seven employees in one office, to having 36 employees across five states. MuniCap, a public finance consulting firm headquartered in Columbia, Maryland, works on a number of unique, large-scale real estate development projects using equally unique financing, including tax-increment financing, special taxing districts, and special assessment districts. “We rarely do small, and we don’t do basic!” Emily says of MuniCap. Last year, they assisted with a company record number of bond closings, over \$1 billion. MuniCap works with both public sector and private sector clients to create funding mechanisms that allow for the revitalization and reinvestment in communities. Emily is especially proud of the redevelopment of Downtown Columbia, a massive, multi-phased project, which financed infrastructure necessary to provide future affordable housing, a cultural center, library, and fire station. “We used much of the new revenues from the development to create these new social benefits,” she says. “It was truly a labor of love.” Currently, Emily is working on several affordable housing projects and a range of other developments focused on active placemaking, inclusiveness, and sustainability. Over her career with MuniCap, Emily has assisted with over 250 bond issues totaling approximately \$5.0 billion in 26 states. In the last three years, MuniCap has assisted with over 100 issuances totaling approximately \$2.1 billion in bonds. Emily has provided supervision on 90% of these transactions. Emily assumed the CCO role in 2016 to ensure the firm met MSRB and SEC requirements, has helped grow MuniCap from one office to five offices, and has handled all the hiring since she started. “I took on as much as I could and now wear a lot of hats in the company,” she says. But what she finds most exciting is the way in which public-private partnerships and these creative funding approaches can give jurisdictions wider options when it comes to meeting their long-term goals. “These unique types of financings are growing, and public sector is realizing they can utilize them as an alternative to accomplish their goals,” she says. “We’re helping clients meet their long-term objectives that help communities create sustainability and sustainable infrastructure. There’s a lot MuniCap makes happen that is needed around the country. We’re in a very unique situation because we’re bringing together the public and private sectors and really transitioning neighborhoods and communities.”

CONTACT DETAILS REMOVED

CHRISTOPHER ALTO

As the CFO of Pinnacle Auto Group, based in Winnipeg, Manitoba, Christopher Alto knows well that the cornerstone of a company's success is its ability to continually grow and evolve. With the insight and expertise of a 17-year accounting and finance veteran whose impressive career includes roles as CFO for Matrix Lumber Inc., and VP of finance for Ben Moss Jewelers, he knows how to make it happen. He's in charge of all financial activity of Pinnacle's three automotive dealerships and two collision centers, as well as strategizing for growth and minimizing risk—and he knows that attention to the small things can make the biggest differences. "I enjoy the problem-solving aspect that arises in my role and rolling up my sleeves and getting into the finer details to understand how something works and how it can be improved. This is extremely rewarding when you see these efforts translate into new revenue streams or reducing costs. I really feel like the team here at Pinnacle Auto Group has allowed me to truly focus on what I am best at."

What he enjoys most, though, are the people. "I have a vision where I see my role in regard to leading organizations and mentoring people," he says. "I want the businesses I work for to consider social good and instill a connection between people, profit, and planet that will last for generations. I also feel it is important to build one-on-one connections with your employees to ensure they are put in situations where they can use their strengths to flourish. Again, being a part of the Pinnacle Auto Group has been so rewarding in that we are constantly striving to be a successful business that focuses on all three of these pillars and being able to work with such passionate and creative people makes it easy to come into work every day." Christopher is also dedicated to giving back to his community. He serves as president of the board of directors for the West Broadway Youth Outreach program, which provides educational and recreational programs for kids aged four to 12 in the Winnipeg area and beyond, and is also a recurring coach for hockey, soccer and ringette for his three kids many sports teams.



CONTACT DETAILS REMOVED

KEN ASEME



After over a decade in investment banking and fund administration with top-tier fund administrators, Ken Aseme noticed a pattern: He saw that managers who needed the most attention were given the least, and he decided to fill that void and help people who were trying to effectively run a business. And thus, Hazic Investments Fund was born in 2009 in Los Angeles, to provide fund CFO and administration services and handle the back-office functions so that business owners could focus on investors and growth. Ken and his team of seasoned experts work with businesses of all sizes and scopes in the U.S. and Europe, tailoring their services to each client's unique needs with a high-touch, boutique approach—all for a fixed monthly fee. They've helped many clients grow from their first fund to a multi-fund strategy, providing guidance and support along the way—and the industry has taken note, with a feature in *Groundbreaker*.

Today, Hazic is seeing considerable expansion, as demand from fund managers increases. "As more venture capital funds come to the market, there are more opportunities to help them through pitfalls that might happen along the way," he says. He also notes that smaller funds are on the rise as barriers to entry come down. "Businesses can start funds, but not necessarily hire full-time CFOs, so they need fractional CFO services as well as a small boutique fund administrator who can provide the high touch and understands the dynamics of these smaller funds." With Hazic's insight into senior management, strict quality controls, and innovative technology, they can provide support for any kind of business, and they've worked with a broad variety of private equity fund types and structures. But it's not just his business and finance acumen that inspired Ken to start the company. "It also plays into my entrepreneurial spirit. I understand the challenges of running a small business, so I can empathize with the manager on a human, personal level and bring in my skill set on a professional level," he says. "I love getting in the trenches with people and helping them build something. It gives me a great sense of personal reward." Ken holds an MBA and is a certified chartered accountant.



CONTACT DETAILS REMOVED

COMPLEMENTARY LISTINGS

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

Full Name
Title/Company
Website/email

BRING YOUR MED-TECH PRODUCT TO LIFE.

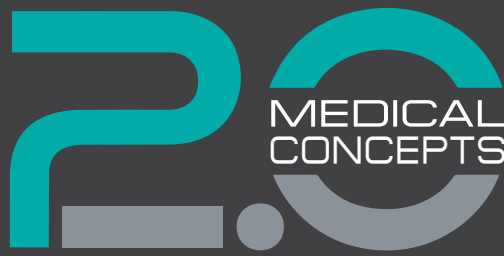


Facilitated Growth Specializes in Go-To-Market Implementation and Private Investments.



FACILITATED GROWTH

Call Us or Submit Your Business Plan Online to Learn More.
212.697.1316 | www.facilitatedgrowth.com



THE NEXT VERSION OF YOU AWAITS

MEDICAL WEIGHT LOSS | HGH PEPTIDES | AMINO THERAPIES



USING MEDICAL SCIENCE TO ACHIEVE THE OPTIMAL YOU

All Programs are Doctor-Assisted & Tailored to Your Specific Needs | Convenient Consultation Platform

Any Age | Any Body Type | Male or Female | Any Fitness Level

CALL OR VISIT US ONLINE TO LEARN MORE:

833-206-3326 | www.2point0mc.com