

JIM MORAN COLLEGE OF ENTREPRENEURSHIP



2025



FOUNDER FRIENDLY CAPITAL CONFERENCE

CORAL GABLES, FLORIDA

17TH & 18TH OF FEBRUARY



FOUNDER FRIENDLY CAPITAL CONFERENCE

FSU Executive Education Program
Jim Moran College of Entrepreneurship
February 17th-18th, 2025

Hyatt Regency Coral Gables
Coral Gables, Florida
(305) 441-1234

WELCOME

On behalf of the entire Jim Moran College of Entrepreneurship,
we are thrilled you are attending the 2025 Founder Friendly
Capital Conference hosted by the Jim Moran Institute.





02
17
25

7:15 AM- 8:00 AM	Breakfast & Conference Check-in Hall of Ambassadors
8:00 AM- 8:30 AM	Welcome and Introduction to the Conference Dr. Susan Fiorito, Dean- Jim Moran College of Entrepreneurship Lewis Schiff, Founder- Birthing of Giants
8:30 AM- 9:45 AM	Overview of the Capital Markets & Founders Friendly Capital Transaction Doug Tatum, Conference Chairman
10:00 AM- 11:00 AM	<i>The Anatomy of a Deal:</i> How a PE Firm Ultimately Chooses to Target an Investment in a Company Facilitators: John Terrando & Duane Donner
11:15 AM- 12:00 PM	Special Guest Jay Jay French: Founding Member of Twisted Sister
12:30 PM- 2:30 PM	Breakout Lunch with PE Firms and Panelists Q&A Time
2:30 PM- 3:30 PM	The Why I <i>Did or Didn't Do It</i> Panel: It's Never Just About the Money Facilitator: Lance Woodbury
3:45 PM- 4:45 PM	<i>The Good, the Bad and the Ugly</i> Panel: The End of the Movie Facilitator: Kevin Poole
6:30 PM- 8:30 PM	Breakout Drinks & Dinner with PE Firms and Panelists Q&A Time



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8:00 AM- 9:45 AM

Breakout Breakfast with PE Firms and Panelists

Meet in the main conference room and leave with assigned PE group

9:45 AM- 10:45 AM

The Investment Banking Process Panel

Facilitators: John Terrando & Duane Donner

11:00 AM- 12:00 PM

Governance & Decision-Making Panel

Facilitators: Kevin Poole, Jeff Hodge & Jeff Haidet

12:30 PM- 2:30 PM

Breakout Lunch with PE Firms and Panelists

2:30 PM- 3:30 PM

Is Your Company Capital Market Ready: Due Diligence

Facilitators: Eric Krucke, Jeff Hodge & Jeff Haidet

3:45 PM- 4:45 PM

Curve Balls and Bad Times Panel: The use of Debt in PE

Facilitator: Eric Krucke and Sir Steven Wilkinson

4:45 PM- 5:15 PM

Closing

Doug Tatum

PRIVATE EQUITY

BROADCREST	<p>Broadcrest Asset Management, is an investment management company based in Winter Park, Florida that operates throughout the United States and specializes in funding emerging growth companies. The firm manages a portfolio approaching \$100 million and is led by John Burden. BroadCrest pursues a balanced investment strategy as a long-term investor in businesses regardless of industry and is uniquely positioned to evaluate and invest in smaller promising companies that are struggling to achieve scale.</p>
EGERIA GROUP	<p>Egeria Group, is an independent Dutch investment company founded in 1997 and based in Amsterdam, Netherlands. The firm operates across three primary asset classes: Private Equity, Real Estate, and Listed Investments, focusing on long-term value growth through entrepreneurial partnerships. Todd Ofenloch leads Egeria in the US with a specific focus on Evergreen (10 plus year) investments. Egeria is committed to building sustainable value by partnering closely with founders and investing in businesses with significant growth potential.</p>
F3 Partners	<p>F3 Partners, is a private equity firm that focuses on partnering with founders and family-owned businesses in the lower middle market. The firm operates as a growth and value accelerator, targeting companies with potential for scale. F3's investment leadership team, partners Alex Goldberg and Justin Federbush bring diverse experience and expertise to their partnerships. The firm typically invests in consumer, business services, healthcare, and technology sectors, with a geographic focus primarily on North America.</p>
PERMANENT EQUITY	<p>Permanent Equity, is a unique private equity firm founded by Brent Beshore in 2007, specializing in long-term investments with a distinctive approach. The firm invests out of 30-year committed funds, focusing on North American companies with \$5-\$75 million in sales and \$1-\$25 million in discretionary free cash flow. Unlike traditional private equity, Permanent Equity has no intention of selling its portfolio companies and rarely uses debt. The firm's investment philosophy centers on preserving company culture, supporting existing leadership, and creating generational value for businesses they partner with.</p>
RED IRON GROUP	<p>Red Iron Group, is a Menlo Park-based private investment firm founded in 2020 by Ben Bisconti and Jason Klein, focusing on partnering with business owners and managers passionate about building market-leading companies. The firm specializes in investing in lower-middle-market companies across various sectors, providing long-term capital and strategic support to help businesses achieve increased scale and value. With a unique investment approach that emphasizes technology enablement, strategic acquisitions, and maintaining existing management teams, Red Iron Group has established a long-term patient capital base. Their investment philosophy centers on supporting entrepreneurs, driving technological innovation, and creating long-term value through collaborative partnerships.</p>
TRIVEST PARTNERS	<p>Trivest Partners, founded in 1981, is one of the oldest private equity firms in the Southeastern United States, headquartered in Miami, Florida, with regional offices across North America. The firm exclusively focuses on investing in founder and family-owned businesses in the lower middle market, with approximately \$4.5 billion in assets under management and over 500 completed transactions totaling nearly \$8 billion in aggregate portfolio value. Trivest specializes in investments across sectors including business services, consumer goods, healthcare, niche manufacturing, and value-added distribution, utilizing a unique "Path to 3x" value creation strategy. The firm is known for its flexible investment approach, offering multiple fund strategies that provide comprehensive solutions for founders seeking partnership or ownership transition, with a commitment to eliminating typical private equity pain points through their "Just Say No" program.</p>

DR. SUSAN FIORITO



Dr. Susan S. Fiorito, is the Dean of the Jim Moran College of Entrepreneurship (JMC), the nation's first College of Entrepreneurship, established with a \$100M gift from Jan Moran and the Jim Moran Foundation. Under her leadership, JMC earned national recognition for excellence in entrepreneurship education. A faculty member since the 1980s, she previously served as Faculty Senate President and on the FSU Board of Trustees. She holds a doctorate from Oklahoma State University and has experience as a business owner.

Dr. Fiorito has taught at multiple universities, including the University of Iowa and the University of Stirling in Scotland. Her research on retail and small business management is widely published, and she co-authored a textbook on retail buying. She has led study-abroad programs in Europe and received multiple university teaching awards. A trailblazer in her field, she was the first female president of the American Collegiate Retailing Association and earned its Academic Lifetime Achievement Award.

DR. ERIC LIGUORI



Dr. Eric Liguori, is a distinguished figure in the field of entrepreneurship education and research. He currently holds the position of Jim Moran Professor and Associate Dean at the Jim Moran College of Entrepreneurship at Florida State University. His academic influence extends to several prominent roles, including Co-Editor-In-Chief of the Journal of Small Business Management, Chair of AACSB's Entrepreneurship & Innovation Affinity Group, and Senior Editor for Entrepreneurship and Innovation at Cogent Business and Management.

Liguori's expertise has garnered recognition from both industry and academia. His work has been featured in major media outlets and cited in policy documents by international organizations. He has collaborated with Fortune 100 companies like Hewlett-Packard and Amazon.com, as well as global entities such as the United Nations and the U.S. Department of State. In 2021, Liguori was inducted as a Justin G. Longenecker Fellow by USASBE, and in 2023, he was named USASBE's Entrepreneurship Educator of the Year. Beyond academia, Liguori is an active angel investor and has served on the Investment Screening Committee of a \$25M private equity fund.

DOUG TATUM



Doug Tatum, Chairman of Newport LLC, a national partnership of CEOs and senior executives who advise emerging middle market companies and assist private equity firms to invest in and grow portfolio companies.

He is also a member of the Teaching Faculty at the Jim Moran College of Entrepreneurship at Florida State University and also Advisory Board Chairman for the Business Dynamics Research Consortium at the University of Wisconsin Extension. He is the Former Chairman of the Board for the Association for Corporate Growth (ACG). In 2017 he was given ACG's Lifetime Achievement Award.

Previously, Doug was Chairman and CEO of Tatum LLC, which grew into a highly respected national professional services firm with 30 offices and over 1000 professionals and employees. The company was sold to Spherion in 2010.

Doug is the author of No Man's Land: Where Growing Companies Fail, a leading text about growth companies that has been translated into several languages and has won four National Best Business book awards. His insights about the economy and business have been cited in hundreds of media outlets including Inc. Magazine, The Financial Times, and The New York Times online.

BIOS

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FACILITATORS & SPECIAL GUESTS

DUANE DONNER



Duane Donner, is an accomplished entrepreneur and business advisor with over 25 years of experience in the mergers and acquisitions advisory service industry. He is the Founder and CEO of Founders Advisors, a middle-market M&A advisory firm he established in 2003. Under his leadership, the firm has grown to a team of over 50 talented professionals across three offices, serving clients with a values-based, relationship-driven approach.

Duane holds a B.S. in Engineering from the University of Louisiana, Lafayette, and an MBA from the University of Alabama's Manderson Graduate School of Business. He also served as a Platoon Leader in a Mechanized Infantry Brigade during his military tenure. Duane is actively involved in various community and faith-based organizations, serving on the boards of Bridge2Rwanda, Fellowship of Companies for Christ (FCCI), and Highlands College. He and his wife Amy have been married for over 30 years and have three daughters, two sons-in-law, and multiple grandchildren.

JAY JAY FRENCH



Jay Jay French, is an American guitarist, manager, record producer, columnist, author and motivational speaker who oversees licensing and intellectual property rights for the Twisted Sister brand. Jay Jay is most famous for his role as the founding member and one of the guitarists of the heavy metal band Twisted Sister. Since his first performances with Twisted Sister, French has played more than 9000 concert performances.

Being an avid runner, French has also completed two New York Marathons, in 1981 and 1986. As a guitar player, manager, producer and executive producer, French has sold over 20 million albums, performed in 34 countries and performed live over 9,000 times. Jay Jay has just released his memoir/business book, Twisted Business: Lessons from My Life in Rock and Roll.

JEFFREY HAIDET



Jeffrey (Jeff) Haidet, is a partner in the Corporate & Finance Transactions Department at Bryan Cave Leighton Paisner (BCLP) Law. With over 30 years of experience, Haidet focuses on domestic and international commercial transactions, including mergers, acquisitions, joint ventures, and strategic alliances. He has served as chief outside legal counsel for several clients, advising on corporate compliance issues and growth strategies.

Haidet joined BCLP in 2023 after a long tenure at Dentons, where he served as US Chairman. He has been recognized by The Legal 500 US for M&A: middle-market and by Best Lawyers in America for Mergers and Acquisition Law and Corporate Law. Haidet is also known for his thought leadership on law firm evolution and collaborative corporate cultures. He holds a J.D. from the University of Toledo and a B.A. from Miami University.

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FACILITATORS & SPECIAL GUESTS

JEFF HODGE



Jeff Hodge, is a seasoned executive search professional with over three decades of experience in the industry. As a Managing Partner at Boyden, a leading global executive search firm, Hodge specializes in board and C-level placements. Throughout his career, he has held leadership positions at top firms and even founded his own search company.

Hodge is known for his personalized approach to executive search, focusing on what's best for both clients and candidates. He is particularly passionate about promoting diversity in executive roles, pioneering initiatives for pipeline development and other creative solutions. Hodge's expertise extends to various sectors, including energy logistics and private equity. His educational background includes a Bachelor of Science in Business Administration from Indiana University. Recently, Hodge has been involved in high-profile searches, such as placing a strategic VP of Finance and Accounting for a private equity client in the energy logistics sector.

SUSAN KEARNEY



Susan Kearney, is a Managing Director at Newport LLC, a strategic advisory firm that helps growth-stage companies improve business value. With extensive experience in technology, education, and professional services, she has held senior executive roles including COO at Network for Good, co-founder and CMO at Voxant, and interim CEO for a financial software company.

Kearney has a proven track record of driving growth, raising capital, and guiding companies through successful transactions, including selling businesses to Grab Networks and Oracle. Her expertise spans organic and M&A growth, fundraising, and strategic consulting, with a focus on helping CEOs optimize their businesses and prepare for potential exits.

ERIC KRUCKE



Eric Krucke, is a seasoned financial executive with over 25 years of hands-on leadership experience, currently serving as the National Practice Director and CFO Practice Leader at Aprio, a top 25 business advisory and CPA firm. At Aprio, Krucke specializes in advising family and founder-owned companies preparing for sale, raising capital, or seeking to accelerate growth. He also partners with private equity firms and their portfolio companies to maximize value creation.

Krucke is known for his strategic approach to financial leadership, challenging traditional CFO stereotypes by emphasizing their role as growth engines for companies. He is a sought-after public speaker, sharing his industry expertise with audiences nationwide, and has been featured in prominent publications such as Inc. magazine. Krucke earned his Bachelor's degree in Accounting from Florida State University and is actively involved in professional organizations including Vistage, the CFO Forum, and Financial Executives International.

BIOS ➡ FACILITATORS & SPECIAL GUESTS

TERESA LYNCH



Teresa M. Lynch, is the Principal and Co-Founder of Mass Economics, Cambridge, Mass., based consulting firm that works with private, public, non-profit and philanthropic clients on urban job creation and socially inclusive growth in US cities.

Mass Economics' recent work includes developing economic cluster strategies that align with a city's assets; evaluating urban innovation assets and potential innovation districts; working with philanthropy to develop frameworks and strategies for inclusive core city economic growth; addressing land and economic development issues in legacy cities; and developing strategies for small business growth across a variety of urban neighborhoods.

KEVIN POOLE



Kevin Poole, is a seasoned business leader and CEO of Newport LLC, a national business advisory firm he joined in December 2012. With over three decades of experience, Poole has a diverse background in both advisory roles and executive management. He spent 20 years at General Electric during the Jack Welch era, followed by 12 years as a senior partner at Ernst & Young and Capgemini, where he advised executive teams in various industries on driving profitable growth.

Poole's expertise includes P&L leadership, CEO-level advisory skills, and sales and marketing effectiveness. He holds an MBA in Marketing and Finance from Columbia Business School and a BA in Computer Science and Finance from the University of Miami. At Newport, Poole leverages his extensive experience to help CEOs and owners of middle-market companies grow, de-risk, and realize their company's value.

LEWIS SCHIFF



Lewis Schiff, is an entrepreneur, author, speaker, and educator specializing in the growth of successful enterprises. As the Chairman of Birthing of Giants, he leads a network of entrepreneurs focused on expanding their businesses and increasing their economic impact. His expertise in wealth-creating behaviors and business practices has made him a prominent figure in the entrepreneurial world.

Schiff's entrepreneurial success includes the sale of two businesses, Armchair Millionaire and MainStreet.com, to publicly traded companies. His acclaimed works include Business Brilliant, The Armchair Millionaire, The Middle-Class Millionaire, and The First Habit, all offering insights into the habits of ultra successful business owners. Known for his engaging presentations, Schiff translates complex business concepts into actionable strategies, making him a trusted advisor and a frequent contributor to Forbes.com and Worth.com.

Schiff also manages the Birthing of Giants Co-Investment Program, helping scaling companies secure growth funding. He co-founded Aegis Response Team, enhancing 911 response times and serving as a case study for Birthing of Giants' growth roadmap. Beyond his professional work, Schiff is involved in philanthropic activities supporting education and economic empowerment, continually providing resources and mentorship to future business leaders.

BIOS

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FACILITATORS & SPECIAL GUESTS

JOHN TERRANDO



John Terrando, is a seasoned financial executive with over 20 years of experience in international investment banking, M&A, and corporate finance. Currently serving as a Managing Director at Newport LLC, Terrando brings a wealth of expertise to clients ranging from pre-revenue startups to companies involved in billion-dollar transactions. His career has spanned multiple countries and industries, honing his ability to identify and solve key challenges in complex financial transactions.

Terrando's educational background includes a Master's in Finance from the London Business School, which complements his entrepreneurial mindset and institutional rigor. In his role as Chief Financial Officer at Liberty Rent, he takes a strategic, long-term approach to ensure the company remains a strong and reliable partner for commercial clients. Outside of his professional life, Terrando enjoys outdoor activities and traveling with friends and family.

ROBERT TRAVIS



Robert Travis, is a Managing Partner at Boyden Executive Search with over 25 years of experience in leadership consulting. As a dual citizen of the U.S. and Canada, he specializes in executive search across multiple industries including manufacturing, energy, technology, and consumer packaged goods.

Travis has been instrumental in establishing Boyden's Atlanta and Calgary offices, and has led executive searches for Fortune 100 and Fortune 500 companies. He brings comprehensive talent sourcing expertise with a functional focus on recruiting for management, finance, sales, marketing, operations, and human resources roles. Travis serves on the board of GABY Inc. and has previously served on Boyden's Global Board, holding leadership roles in various committees including Audit & Finance, Governance, and Technology.

SIR STEVEN WILKINSON



Sir Steven Wilkinson is a highly experienced entrepreneur, investor, and business mentor with a strong background in finance and strategic growth. As the founder of Good & Prosper, he is dedicated to promoting ethical and sustainable business practices, helping companies navigate mergers, acquisitions, and long-term value creation. His expertise spans across investment management, financial strategy, and leadership development, making him a trusted advisor for businesses seeking to achieve sustainable success.

With a passion for empowering entrepreneurs, Wilkinson has spent his career guiding companies toward their full potential while upholding principles of integrity and responsible business practices. His insights into financial stewardship and value-based leadership have helped numerous organizations build lasting success. Through his work, he continues to inspire business leaders to align profitability with purpose, fostering a more sustainable and ethical business environment.

BIOS ➡ FACILITATORS & SPECIAL GUESTS

LANCE WOODBURY



Lance Woodbury, is a highly respected family business advisor and consultant with over two decades of experience in the agricultural sector. As a founding partner of Ag Progress, LLC, Woodbury specializes in helping closely-held agriculture businesses navigate complex issues such as succession planning, family communication, and long-term strategic decision-making. He brings a unique perspective to his work, combining his academic background in conflict resolution and business with hands-on experience in both consulting and managing large accounting practices.

Woodbury is also a prolific writer, authoring two books on family business and regularly contributing columns to DTN/The Progressive Farmer. His expertise extends to facilitating peer groups for agriculture business owners across the United States and teaching Family Business Management at The Executive Program for Agriculture Producers (TEPAP) at Texas A&M University.

With his deep roots in agriculture and rural communities, Woodbury continues to make significant contributions to the field of family business consulting, helping agricultural enterprises thrive across generations.

FSU | JIM MORAN COLLEGE OF ENTREPRENEURSHIP

Whether you're a **student** or a **business professional**, Florida State University's Jim Moran College of Entrepreneurship is here to fuel your success.

JIM MORAN COLLEGE OF ENTREPRENEURSHIP

As the nation's first standalone College of Entrepreneurship at a public university, the college provides all FSU students with the tools to lead and innovate through collaborative programs, competitions, and resources.

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Undergraduate Programs

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Graduate Programs

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Undergraduate Minors

JIM MORAN INSTITUTE FOR GLOBAL ENTREPRENEURSHIP

Supporting small business owners and nonprofit organizations across Florida, JMI offers executive education programs at little to no cost.

- Small Business Executive Programs
- Nonprofit Executive Programs
- Entrepreneurship Bootcamp for Veterans
- CEO Peer2Peer Groups
- Adversity Programs
- Speaker Series
- JMI Annual Conference

jmc.fsu.edu



JIM MORAN INSTITUTE FOR GLOBAL ENTREPRENEURSHIP
FLORIDA STATE UNIVERSITY | JIM MORAN COLLEGE OF ENTREPRENEURSHIP
Celebrating 30 Years

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AUTO FINANCIAL GROUP



RICHARD
EPLEY
CEO



ANDRE BAHRI
CFO

Auto Financial Group (AFG), is a financial technology company founded by Richard Epley in 1999. Based in Houston, Texas, AFG specializes in providing innovative automotive financing solutions, particularly for credit unions. The company's flagship product, DrivingSense™, is a residual-based finance solution that allows credit union members to customize vehicles and access electronic loan documents. Under Epley's leadership as CEO, AFG has expanded its services to include lease programs and has grown internationally with the acquisition of CUL Administration of Canada in 2018, rebranded as AFG Canada. The company celebrated its 20th anniversary in 2020 and continues to focus on delivering technology-driven financial products to the automotive industry.

APLIN



JEFF APLIN
CEO

Aplin, a private, family and employee-owned Canadian corporation founded in Alberta in 1975. As an award-winning staffing and recruiting agency, Aplin provides temporary, contract, and permanent staffing solutions across Canada and the US, specializing in professional services and IT recruitment. With over 49 years of experience, the company offers services including Temporary & Contract Staffing, Permanent/Direct Hire Search, IT Recruitment, and Managed Services. Aplin's mission is to build a world-class winning culture that pursues success and rewards growth while providing a seamless talent agency experience. The company has expanded its reach through partnerships like CompuStaff, which focuses on IT staffing, and has garnered positive testimonials for its efficient and personalized approach to recruitment.

ARTISTRY
RESTAURANTS



MITCHELL GOFF
EXECUTIVE VICE PRESIDENT

Artistry Restaurants, is a Winter Park, Florida-based restaurant platform that acquires, unites, and elevates restaurant brands. They are people-first in everything they do. Before we grow brands, expand properties, or enhance operations, we invest in our people – the heart of our organization. As a company founded by passionate hospitality experts, they deeply understand the dedication and care that goes into creating exceptional guest experiences. Artistry Restaurants, has a portfolio of seven distinctive brands and 50 restaurants, Artistry Restaurants invests in fast casual, casual, polished casual, and fine dining segments. The company aims to cultivate a unique dining experience through its diverse range of restaurant concepts.

ASSURA

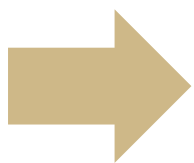


JOSHUA COLE
CHIEF TECH
OFFICER



KAREN COLE
CEO

Assura, a cybersecurity company based in Richmond, Virginia, has a mission to make cybersecurity accessible to organizations of all sizes, not just those with large budgets. The goal is to safeguard the future, one client at a time. Assura provides a range of services including managed security, cybersecurity consulting, and compliance solutions. They offer 24/7/365 protection, monitoring, and defense for their clients, as well as security awareness training and guaranteed compliance with regulatory audits. Assura serves various industries, including government, healthcare, financial, and manufacturing sectors, with a focus on delivering affordable and comprehensive cybersecurity solutions.



AVT SIMULATION



KYLE CROOKS
CEO



KIMBERLY SHELDON
CFO

AVT Simulation, founded in 1998 and headquartered in Orlando, Florida, is a leading provider of engineering products and services for military training systems. The company specializes in simulation and training solutions for various branches of the U.S. military, including the Air Force, Army, Navy, and Marines. As of 2025, AVT employs approximately 100 people and occupies a 43,000-square-foot facility in Orange County, near the University of Central Florida. Led by CEO Kyle Crooks, AVT Simulation is recognized as a Small Disadvantaged Minority Owned business and has experienced steady growth in Orlando's modeling, simulation, and training industry. The company recently expanded into a new state-of-the-art facility called the "Collaboration" building, which aims to foster partnerships between government and industry in the defense sector.

AX9 SECURITY



MOHAMED AHMED
CEO



YOUSSEF ABDALLAH
COO



HAMZAH MOHAMMED- CEO

AX9 Security, headquartered in Concord, California, is a national physical security provider offering a wide range of services to businesses across various industries. The company has experienced significant growth, being listed in the Inc. 5000 and rated as a "Top Security Company" by Inc. Magazine. AX9 Security employs over 3,000 security professionals and provides services including unarmed and armed security guards, VIP escorts, high-value cargo transport, and specialized industry-specific solutions. Led by CEO Mohamed Ahmed, the company prides itself on its ability to customize security services to meet each client's unique needs, utilizing advanced technology and highly trained personnel to ensure top-quality protection.

BIOLABS PRO®



MATTHEW SKAMSER
CEO

BIOLabs PRO®, is a natural health brand and manufacturer specializing in high-quality topical products designed for both men and women. They focus on addressing aging symptoms through natural herbs and bio-identical ingredients that help balance hormone levels. BIOLabs PRO® offers a range of products, including creams containing bio-identical progesterone or estrogen derived from wild yams, as well as supplements and beauty products. The company has been recognized on the Inc. 5000 list for multiple years, demonstrating significant revenue growth. BIOLabs PRO® also serves doctors, clinics, and integrative health practitioners across the USA and globally.

BLAKE WILLSON
GROUP

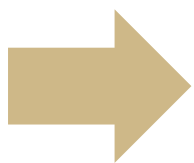


RJ BLAKE
CEO



WHITNEY BLAKE
EXECUTIVE
CONSULTANT

Blake Willson Group (BWG), is a fast-growing firm delivering strategically focused professional services and technology solutions to the defense, intelligence, and civilian sectors. As a Small Business Administration (SBA) approved 8(a) and CVE-certified Service-Disabled Veteran-Owned Small Business (SDVOSB), they harness technology to improve financial stewardship and solve challenging federal problems. BWG offers expertise in areas like financial management, audit readiness, cybersecurity, and grants management, utilizing industry-leading compensation packages and training programs to retain top-tier professionals. The company is committed to providing purpose, direction, and motivation to its team, clients, and communities, with core values centered on integrity, service, and respect.



BOMBSHELL
PRODUCTIONS



MEREDITH LASHER
PRESIDENT

Bombshell Productions, co-founded in 2011 by Meredith Lasher and Rick Boggs, is a full-service production, design, and fabrication agency based in the United States. The company specializes in creating immersive experiences across various sectors, including set design, retail environments, pop-ups, trade show booths, and marketing activations. With a team of skilled artisans, craftspeople, and technicians, Bombshell Productions offers comprehensive project management from ideation and design to installation and post-event review. Their approach emphasizes collaboration, technical precision, and a commitment to transforming spaces with innovative, high-quality solutions. Led by Meredith Lasher as President and Rick Boggs as Director of Design, the company prides itself on its "Bomb Squad" mentality and ability to deliver extraordinary, memorable experiences for clients.

BUTTE FENCE



JARED BELL
PRESIDENT & CEO

Butte Fence, founded in 1994 in Paul, Idaho, is a leading fence company serving the Treasure Valley and Magic Valley regions of Idaho. With locations in Meridian and Twin Falls, the company has grown to become one of the largest vinyl fence suppliers in the western United States. Butte Fence offers a wide range of fencing solutions, including vinyl, wood, ornamental iron, concrete, and chain link fences, as well as decks, patio covers, and boat docks. As of 2025, the company employs over 30 staff members and utilizes 10-15 subcontractors. With an annual revenue of \$6.3 million, Butte Fence has established itself as a trusted name in the industry, known for its extensive inventory, quick installation services, and commitment to customer satisfaction.

CANDELA CONTROLS



BILL ELLIS
PRESIDENT



MARK ADELHELM
ASSISTANT
GENERAL MGR

Candela Controls, founded in 1999 by Bill Ellis and Steven Helliker, is a licensed limited-energy electrical contractor specializing in lighting system integration and control. Based in Winter Garden, Florida, the company is a UL508-A Panel Shop that provides design/build, turnkey solutions for lighting, dimming, and lighting control systems. With over 150 years of combined industry experience, Candela Controls has worked on award-winning projects across North America, South America, Europe, and the Far East. The company serves various sectors including commercial, healthcare, infrastructure, and institutional, offering services such as system layout, fabrication, programming, installation, and training. As of 2025, Candela Controls has completed 27 Procore projects with an average project size of \$115,020,238.

CLARK'S LUMBER &
MILLWORK



REBECCA STEWART
CFO

Clark's Lumber & Millwork (CLM), is a specialty contractor serving the Fredericksburg, VA area, specializing in custom cabinetry and millwork for commercial and residential use. Established in 1986, the company provides services for Northern Virginia, Richmond, and the Washington DC Metropolitan Area. They offer a wide array of materials and services, including custom windows, doors, trims, moldings, sheet products, columns, railings, and solid surface countertops. CLM caters to corporate interiors and the healthcare industry, offering complete design and manufacturing of custom cabinetry and millwork with CNC capabilities, along with standard and custom color matching of finishes. They work on various commercial projects, including apartments, condominiums, banks, hospitals, and restaurants.

BIOS

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FOUNDERS | COMPANY LEADERS

CORTICO-X



SUJAY SAHA
CEO

Cortico-X, founded in 2022, is an experience-led transformation business and a division of Acquis Consulting Group. Based in New York, the company specializes in creating exceptional customer and employee experiences through a unique blend of human-centered design and data-driven insights. Cortico-X offers services in experience management, data analytics, growth strategy, service design, and digital innovation. Led by President Sujay Saha, the company partners with clients and technology firms to accelerate digital transformation, incubate new products, and drive strategic growth. Cortico-X's approach is rooted in the concept of "Return on Experience" (RoX), which links experiences across leaders, employees, and customers to create a virtuous loop for business transformation.

DATAVIZION



KELLY SCHRAD
FOUNDER

DataVizion, established in 2001, is an IT firm that provides a full range of business technology solutions, including professional and managed IT services, to businesses ranging from small to enterprise-level. The company aims to enhance speed, flexibility, and productivity in a secure environment for its clients. DataVizion builds solutions that focus on innovation, collaboration, and security, helping customers optimize their IT and IoT infrastructure while safeguarding their network. They offer services such as strategic planning, system integration, and tailored solutions to address unique IT challenges. DataVizion is an Aruba Platinum Partner, delivering lean solutions with digital innovation consulting across mobile, cloud, disruptive technologies, and cybersecurity.

FIBERSMITH



DONNY SMITH
CEO

Fibersmith, founded by Donny Smith, is dedicated to expanding broadband internet access to rural and historically underserved areas. The company has grown from a one-person operation to a team of 36 employees across multiple locations. Fibersmith specializes in engineering and consulting services for rural ISPs, CLECs, and government entities, focusing on fiber optic design and implementation. The company has been responsible for deploying at least 20,000 miles of fiberoptic cable and evaluating over 100,000 utility poles. Fibersmith has expanded into four companies offering diverse services, including Vision Software, which provides integrated management solutions for telecom businesses. With projects completed in 40 states, Fibersmith continues to grow and innovate in the broadband expansion industry.

FREESTYLE BRANDS



JEFFREY L. GREGG
CEO & OWNER

Freestyle Brands, is a privately held group founded in 2016 and based in Carrollton, Texas. The company specializes in acquiring and building consumer lifestyle brands with a strong heritage and loyal customer base. Freestyle Brands is particularly known for its focus on the watch and action sports industries, with its flagship brand Freestyle USA offering water-resistant watches for watersports enthusiasts. Under the leadership of CEO Jeff Gregg, the company has expanded its operations across 46 states, Canada, and Mexico. As of 2025, Freestyle Brands operates from two AT&T data centers in Dallas and Atlanta, providing a range of products including the popular Shark Watch series.



GLYCARE®



KYLE MOONEY
CEO

GlyCare®, founded in 2014, is a specialized healthcare company that revolutionizes inpatient diabetes management. GlyCare® offers a comprehensive glycemic care program for hospitals, utilizing a team of dedicated nurse practitioners supervised by board-certified endocrinologists. The company's evidence-based population management service focuses on proactive glycemic control, aiming to reduce complications, length of stay, and readmission rates. The company's innovative approach has shown impressive results, including an 80% reduction in ER visits for severe hypoglycemia within 30 days of discharge and a 30% decrease in readmission rates. As of 2025, GlyCare® operates across multiple facilities, providing its services at no cost to healthcare institutions while billing on a fee-for-service basis at midlevel reduced rates.

GO2 DELIVERY



ERIC BROWN
CEO

GO2 Delivery, is a Virginia-based courier company committed to sustainable practices and the restoration of the local Chesapeake Bay ecosystem. Rebranded in January 2024, GO2 Delivery specializes in providing consultative delivery services, especially for businesses, pharmacies, and healthcare systems, ensuring timely and reliable deliveries. Grounded in the core values of innovation, minimalism, and interconnectedness, the company leverages the latest technology and methodologies to ensure efficient, eco-friendly deliveries. CEO Eric Brown emphasizes the company's dedication to making a positive impact on the environment while maintaining a high standard of service. GO2 Delivery aims to revolutionize the delivery service industry with a steadfast commitment to sustainability, innovation, and unparalleled customer service.

INNOVATIVE
ENVIRONMENTS



CRAIG KOOPERSMITH
CEO

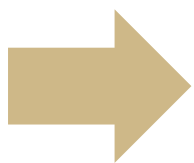
Innovative Environments, founded in 2017 and based in Houston, Texas, is a full-service design and fabrication company specializing in custom solutions for corporate interiors, multifamily signage, broadcast studios, and trade show exhibits. Led by CEO Craig Koopersmith, the company emerged from Skyline Displays of Houston and has since expanded its services. Innovative Environments offers a wide range of services including design, fabrication, installation, and project management for various sectors such as corporate offices, retail spaces, airports, and academic institutions. With 326 collective years of experience among its team, the company prides itself on creativity, customization, and strong client partnerships. As of 2025, Innovative Environments continues to grow, providing cutting-edge solutions for branded interiors and exhibition spaces.

INTERRA
INTERNATIONAL



STEPHEN ISAF
CEO

Interra International, founded in 2000 and headquartered in Atlanta, Georgia, is a global leader in the trade and distribution of food products and ingredients. The company specializes in supplying a wide range of commodities, including poultry, pork, beef, dairy, nuts, rice, sugar, and edible oils to over 112 destination countries. With annual revenue of \$166.1 million as of 2024 and approximately 175 employees, Interra International has streamlined the supply chain through a proprietary platform supporting logistics and distribution. The company's multilingual team, fluent in over 14 languages, serves various sectors including retail and foodservice industries. Interra International prides itself on its commitment to providing customers and suppliers with exceptional value, accurate market information, and efficient global trade solutions.



KODA TECHNOLOGIES



JOHN
SCHUMACHER
BOARD MEMBER



JULIE
SCHUMACHER
FOUNDER & CEO

KODA Technologies, founded in 2017, is an engineering services company located in Huntsville, Alabama, specializing in defense system design, integration, and testing. They focus on solving complex problems of national importance and advancing U.S. technological capabilities. KODA offers expertise in areas such as radar systems, missile systems, test planning and execution, and systems engineering and integration. The company's core values are centered around being allies to their customers and each other, reflected in their name, which means "allies" in Native American. KODA is recognized for its award-winning culture and is committed to giving back to the community. They serve various customers, including MDA/GME, MDA/DEE, SMDC Hypersonics, and SMDC Space Concepts. KODA's estimated annual revenue is \$19.1 million, and they have 69 employees.

LEADINGAGILE



MIKE COTTMAYER
CEO

LeadingAgile, founded in 2010 and headquartered in Atlanta, Georgia, is a company dedicated to helping large, complex organizations achieve Agile transformation. Led by CEO Mike Cottmeyer, LeadingAgile has grown from a one-person operation to a team of over 150 employees. The company offers a unique, systems-first approach to Agile transformation, focusing on business structure, practices, and culture. LeadingAgile has worked with more than 180 companies across various industries, primarily Fortune 100 firms. Their services include consulting, training, talent development, and specialized offerings like Studios and Labs to support and sustain Agile transformations. With a data-driven methodology, LeadingAgile aims to help clients improve predictability, quality, and innovation while reducing costs and time-to-market.

LIBERTY RENT



BUBBA GRIMSLEY
FOUNDER &
CHAIRMAN



TATUM REZIN
CEO

Liberty Rent, founded in 2014, is a SaaS analytics company that partners with multifamily property management companies to increase occupancy rates while managing risk. The company provides risk analysis, payment services, and third-party claims settlement for multifamily property owners and managers. Liberty Rent's rent guarantee solution aims to facilitate "no cost, no risk" acceptance of potential residents, helping property managers increase profits by eliminating rent losses and lowering tenant acquisition costs. Their services include a proprietary software platform that provides risk analysis to claims and collections. Liberty Rent aims to dismantle bias, expand access to desirable homes, and help communities grow through inclusive practices while meeting community needs for stable, profitable rent revenue.

MECHANICAL ONE



JASON JAMES
CEO

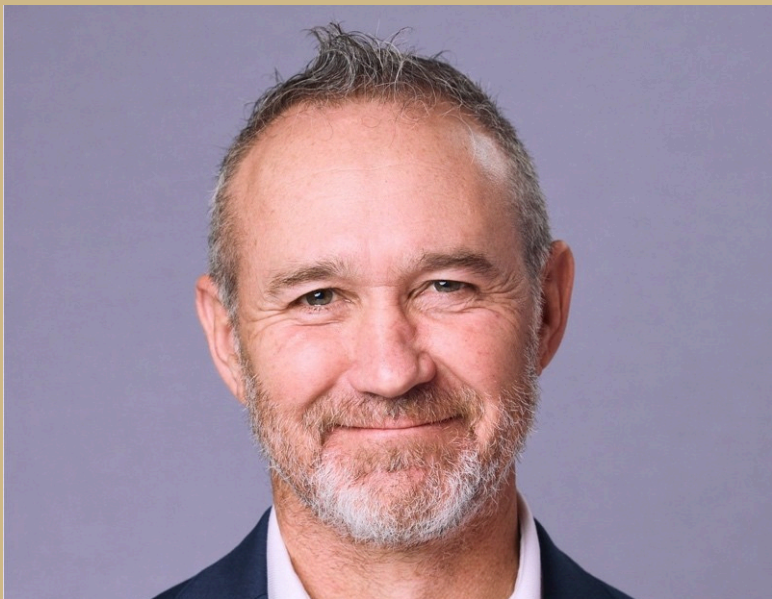


JOHN SCHENKEL
CFO

Mechanical One, is a full-service home repair and maintenance company based in Altamonte Springs, Florida. Founded in 2021 by Jason James, the company has rapidly expanded to provide HVAC, plumbing, gas, and electrical services across Central Florida. With locations in Orlando, Tampa, Fort Myers, Melbourne, and Jacksonville, Mechanical One serves both residential and commercial clients. The company has experienced significant growth, employing over 500 people as of 2025. Mechanical One is known for its commitment to customer satisfaction, community involvement, and employee development, including a unique home giveaway program for staff. The company has also partnered with Valencia College to establish a new trade school, demonstrating its dedication to fostering skilled tradespeople in the region.



MORE® SURFACE CARE



STEVE WOLF
CEO

MORE® Surface Care, founded in 2015 and based in Palo Alto, California, is a leading manufacturer of eco-friendly surface care products for natural stone, tile, and masonry surfaces. The company, a two-time Inc. 5000 honoree, specializes in water-based, high-performance sealers, cleaners, and enhancers. MORE® Surface Care's flagship product, AntiEtch®, is a revolutionary UV-cured treatment that provides 100% guaranteed marble protection. The company's products are trusted by luxury brands worldwide, including Ritz Carlton, Four Seasons, and The Venetian. With a commitment to sustainability, MORE® Surface Care has reduced VOC emissions by up to 90% in their products. As of 2025, the company has expanded internationally, serving markets in the U.S., Canada, Europe, Australia, and Asia.

MOUNT STORM FOREST PRODUCTS



ED MIKOWSKI
OWNER &
PRESIDENT



DEBBIE DEATON
CONTROLLER

Mount Storm Forest Products, established in 1980 in Windsor, California, is a leading wholesale distributor of hardwood lumber, plywood, and related building products. The company serves woodworkers, manufacturers, lumber yards, and home centers across Northern California, the United States, and internationally. With 90,000 square feet of space and state-of-the-art equipment, Mount Storm offers a diverse inventory of hardwoods, softwoods, and imported lumber, processing about 100,000 board feet of each annually. Under the leadership of President and owner Ed Mikowski, the company has grown from a small operation to a team of over 170 employees, many with 15-40 years of experience. Mount Storm prides itself on quality products, consistent service, and value-added capabilities including millwork, custom moldings, and precision cutting.

NICKELL PPS



ROBERT P. NICKELL
CEO

Nickell Professional Pharmaceutical Services (Nickell PPS) is a national resource for mail order pharmacy, FDA manufacturing, FDA Outsourcing Facility, healthcare staffing, and medical and pharmaceutical billing and collection. Founded by Robert P. Nickell, the company leverages Nickell's extensive experience in pharmaceutical services. As a multi-faceted healthcare services organization, Nickell PPS provides comprehensive solutions across various segments of the pharmaceutical and healthcare industries. The company draws on Nickell's background as a pharmacist, entrepreneur, and past president of the California Pharmacists Association, utilizing his expertise to deliver innovative pharmaceutical services.

OBM



DANIEL LAWRENCE
CEO

OBM, is a Baltimore-based software company founded by Daniel Lawrence and Jacob Luers, specializing in energy curtailment and management solutions for large-scale computing operations. Their flagship product, Foreman, initially focused on Bitcoin mining management but has expanded to address energy demands in artificial intelligence computing. As of 2025, OBM has curtailed over 2.5 million megawatt hours of energy and saved customers more than \$66 million through effective energy management. The company recently launched a first-to-market product that reduces energy loads for AI computing without interrupting workloads, capable of delivering over 80% of AI load back to the grid during curtailment events. OBM has received significant funding, including a \$3 million Series A round in 2022, and continues to innovate in the field of energy optimization for compute-intensive industries.

BIOS

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FOUNDERS | COMPANY LEADERS

OP2 LABS	<div></div> <div>ALEXANDER KUNZ CEO & CHAIRMAN OF THE BOARD</div>	<p>OP2 Labs, founded in 2014 by former Navy SEALs Alexander Kunz and Jeff Byers, is a Fort Worth, Texas-based company specializing in innovative collagen-based nutritional supplements. The company develops, manufactures, and sells products under two main brands: Frog Fuel for sports and active nutrition, and ProT GOLD for health and medical nutrition. OP2 Labs' proprietary Nano Hydrolyzed Collagen formula is designed for rapid assimilation and is used in nearly 4,000 medical facilities nationwide. The company has experienced significant growth, making the Inc. 5000 Fastest Growing Companies list for five consecutive years (2020-2023). As of 2025, OP2 Labs reports an annual revenue of \$23 million and employs 15 people, positioning itself as a leader in the rapidly expanding collagen market.</p>
ORACLE LIGHTING	<div><div></div><div>JUSTIN HARTENSTEIN PRES/ FOUNDER</div></div> <div><div></div><div>TIFFANIE HARTENSTEIN CEO</div></div>	<p>ORACLE Lighting, founded in 1999 and based in Metairie, Louisiana, is a leading innovator in the automotive lighting industry. The company specializes in designing and manufacturing custom lighting solutions for various vehicle types, including cars, motorcycles, and marine applications. ORACLE Lighting has received numerous accolades, including being named SEMA's Manufacturer of the Year in 2021 and appearing on the Inc500 list of Fastest Growing Businesses in the USA for nine consecutive years. With a focus on quality, innovation, and customer service, ORACLE Lighting offers a wide range of products such as LED halos, underbody lighting kits, and custom headlight builds. As of 2025, the company continues to expand its product line and maintain its position as a trusted partner in the automotive aftermarket industry.</p>
PLUSHBEDS®	<div></div> <div>MICHAEL HUGHES CEO</div>	<p>PlushBeds®, founded in 2008 by Michael Hughes, is a leading online luxury mattress manufacturer and retailer specializing in organic and natural latex mattresses. Based in Camarillo, California, the family-owned company has grown to employ 80 people and is committed to sustainability, crafting mattresses without chemicals, pesticides, or synthetic materials. PlushBeds® offers a range of products including memory foam, latex, and hybrid mattresses, all of which are GreenGuard Gold certified and hand-crafted in the United States. The company distinguishes itself through its dedication to transparency, fair worker treatment, and superior customer experience, providing customers with a 100-night trial, lifetime warranty, and a focus on health-conscious, environmentally friendly sleep solutions.</p>
PRACTICE CFO	<div></div> <div>WES READ CEO</div>	<p>PracticeCFO is a specialized financial management firm founded in 2014, focusing on providing comprehensive financial services to dental practice owners. Based in San Diego, California, the company offers a range of services including accounting, tax planning, investment management, and CFO advisory. PracticeCFO utilizes a team-based approach, assigning dedicated CFO teams to clients to create customized financial plans for both personal and practice finances. The firm has gained recognition for its expertise in the dental industry, serving hundreds of dentists across the United States. As of 2025, PracticeCFO is known for its integrated approach to financial management, combining practice growth strategies with personal wealth accumulation plans for dental professionals.</p>

BIOS

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FOUNDERS | COMPANY LEADERS

PRIMO DESIGNS



LEONARD NAUMOVICH
PRESIDENT



ANDREW TVARDZIK
CRO



SAM TVARDZIK- CFO

Primo Designs, founded by Len Naumovich in January 1985, is a wholesale manufacturer and supplier of screen printed and embroidered apparel, promotional products, and digitally printed signage. Based in Springfield, Illinois, the company serves various sectors including healthcare providers, corporate and manufacturing companies, and schools. Primo Designs has experienced significant growth, making Inc. magazine's list of the 5000 Fastest-Growing Private Companies in America in 2024, ranking 4,019th with 112% growth over a three-year period. The company offers a wide range of services, including custom t-shirts, company web stores, and branded promotional items. With over 5,000 businesses served since its inception, Primo Designs prides itself on quality products, fast delivery, and personalized customer service.

RGP INVESTMENTS



FRANÇOIS
BEAUDOIN
PRESIDENT & CEO



EMMANUELLE
DEGUARA
VICE PRESIDENT

RGP Investments, has been delivering innovative investment solutions for 25 years, specializing in active sector management and a science-driven approach to help clients achieve their financial goals. As a leader in Responsible Investing, RGP integrates Environmental, Social, and Governance (ESG) principles into its investment philosophy, emphasizing the societal and environmental impact of investments. By forming strategic partnerships and aligning capital growth with client values, RGP positions itself as a pioneer in sustainable investing. A United Nations Principles for Responsible Investment (PRI) signatory and member of the Responsible Investment Association (RIA), RGP is committed to advancing ethical and impactful investment practices.

RIVER POINT
TECHNOLOGY



JEFF EIBEN
CEO

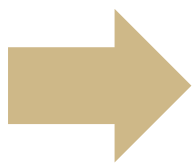
River Point Technology (RPT), founded in 2011 and based in Canonsburg, Pennsylvania, is an award-winning cloud and DevOps service provider. RPT specializes in helping Fortune 500 companies accelerate digital transformation through custom IT solutions, year-round enablement, and expert-led training. RPT offers services in cloud and data platforms, DevOps, automation, operational readiness, security, and application modernization. With an annual revenue of \$5 million and a team of 33 employees as of 2025, RPT utilizes its proprietary Value Creation Technology process to empower IT teams to take strategic risks resulting in measurable business impact. RPT serves various industries, including healthcare, insurance, banking, manufacturing, and government agencies, focusing on simplifying the deployment, integration, and management of emerging technologies.

ROYAL BASKET
TRUCKS®



THOMAS CARNEY
PRESIDENT

Royal Basket Trucks®, founded in 1982 and headquartered in Darien, Wisconsin, is a leading American manufacturer of high-quality material handling carts and containers. The company specializes in producing a wide range of products, including basket trucks, laundry carts, and custom solutions for various industries such as healthcare, hospitality, manufacturing, and education. With a focus on innovation and customer service, Royal Basket Trucks® offers products in multiple materials, including vinyl, canvas, and molded plastic, with options for customization. As of 2025, the company employs approximately 170 people and generates annual revenue of \$12.9 million. Royal Basket Trucks® is known for its commitment to quality, short production timelines, and ability to create tailored solutions for specific customer needs.



SPP DENTAL PARTNERS



Mike Connelly
Director of Business Management

SPP Dental Partners, is a doctor founded, doctor led group of progressive dentists that are invested in the growth of their practice and the SPP Group. SPP (Saving Private Practice) Dental Partners empowers private practice dentists to build wealth, gain ongoing support, and enjoy a flexible lifestyle. With SPP, doctors retain 100% autonomy in managing their practice while benefiting from comprehensive business support that helps them grow and free up more personal time. SPP offers long-term opportunities for wealth-building beyond the walls of their own practice, allowing dentists to focus on excellent patient care and achieve financial growth with independence. The Dentists have seen the trends and witnessed first-hand how DSO's and corporate dentistry are consolidating the industry. Our mission is to help private practices compete with the DSO's while benefiting from the value of a group.

SUMMIT VIRTUAL CFO
BY ANDERS



ADAM HALE
PARTNER



JODY GRUNDEN
PARTNER

Summit Virtual CFO by Anders, is a distributed team providing innovative virtual CFO services to small and medium-sized businesses across the United States. Founded in 2002 as Summit CPA Group and later merging with Anders CPAs + Advisors in 2022, the company offers comprehensive financial reporting, forecasting, and tax services. Led by Jody Grunden, Summit Virtual CFO by Anders specializes in helping clients maximize profits, minimize taxes, and improve cash flow through a subscription-based model. Their team of remote industry-focused virtual CFOs provides services at an average cost of \$78,000 per year, significantly less than a full-time CFO. The company has grown rapidly, doubling in size every three years, and is known for its thought leadership in the accounting industry.

SWIFTWALL®



JOE ASIALA
CEO

SwiftWall®, founded in mid-Michigan as Signature Wall Solutions in 2014, is a manufacturer of sustainable, reusable modular wall systems that are an alternative to traditional drywall. They aim to simplify construction by offering temporary wall solutions that are quick to assemble, easy to reconfigure, and environmentally friendly. SwiftWall has four key product lines: SwiftWall Max, SwiftWall Pro, SwiftWall Lite, and SwiftWall Flex, catering to varied needs across industries like retail, airports, healthcare, and construction. The company has received recognition as one of the fastest-growing private companies in the U.S., ranking 13th among manufacturing companies on the 2022 Inc. 5000 list. SwiftWall is committed to sustainability, offering products that can be reused multiple times, reducing waste from construction projects.

THE REESMAN
COMPANY



CHRISTOPHER
REESMAN
PRESIDENT



JR REESMAN
CHAIRMAN

The Reesman Company, founded in 1970 and based in Burlington, Wisconsin, is a family-owned business specializing in construction, landscaping, and aggregate services. With over 50 years of experience, the company offers a wide range of services including excavation, grading, landscape design, site development, and custom woodworking. The Reesman Company serves various sectors, from residential to commercial and municipal projects, across southeastern Wisconsin. Led by multiple generations of the Reesman family, including Chris Reesman as President, the company has expanded its offerings to include aggregate operations and landscaping services. The Reesman Company is known for its commitment to quality, environmental stewardship, and customer satisfaction, with a focus on bringing clients' visions to life while adhering to their core values of hard work and service.



U.S. TRANSACTIONS
CORP.



WADE TETSUKA
PRESIDENT

U.S. Transactions Corp. (UST), is a merchant services provider founded in 2009, specializing in credit card processing for Associations, Non-Profits, and B2B enterprises. The company offers innovative payment solutions, including USTPay for Microsoft Dynamics 365 Business Central, which integrates with over 120 payment gateways. UST is known for its personalized service, high client retention rate of over 95%, and focus on cost-efficiency for its clients. The company has expanded its services to include the UST Education Academy, offering CAE and CPE-approved webinars. Led by President and CEO Wade Tetsuka, UST has grown to serve over 500 clients, providing tailored merchant services, PCI compliance support, and advanced reporting capabilities.

VIGILITI, INC. dba
TRUSTn



LISA LONDON
CEO

Vigiliti, Inc. dba TRUSTn, was co-founded by Lisa London and serves as the Director of Operations. She is commercializing TRUSTn (www.TRUSTn.io), a patented Artificial Intelligence (AI) chatbot content trained, to collect suspicious activity, tips and leads from the public. Research has shown that the chatbot provides more actionable intelligence than commonly used static web forms or telephone hotlines, in real time. Her previous company, Edifice, was a multi-year Inc. 500 awardee. Her focus with Edifice was on classified federal government mission-critical specialty projects worldwide.

VRC METAL SYSTEMS



ROBERT HRABEC
CEO



TERREE MATSON
PRESIDENT &
COO

VRC Metal Systems, founded in 2013 and headquartered in Box Elder, South Dakota, is a leading manufacturer of high-tech metal working equipment and automation systems, specializing in cold spray technology. The company's flagship product, the VRC Gen III, is a high-pressure cold spray system used for coating, repairing, and additive manufacturing of metal parts. VRC serves various sectors including aerospace, defense, energy, and transportation, offering complete turn-key cold spray systems and on-site installation services. With 51-200 employees and annual revenue between \$10-25 million, VRC has become a key player in the U.S. cold spray market. The company has received recognition for its innovative solutions, including SBIR grants, and continues to expand its global presence while developing advanced manufacturing technologies for both military and commercial applications.

WATERFRONT WEALTH
MANAGEMENT



RUFUS CRESSEND
FOUNDER



JAMES RAY
FINANCIAL
ADVISOR

Waterfront Wealth Management, is a financial advisory team based in Metairie, Louisiana, operating as part of Ameriprise Financial Services. Founded in 2005, the company provides personalized wealth management services, including financial planning, investment advice, and asset management. Led by Rufus Cressend, the team has received recognition such as the Forbes Best-in-State Wealth Management Teams award in 2024 and the Ameriprise Client Experience Award in 2020. Waterfront Wealth Management focuses on helping clients navigate complex financial decisions, including wealth preservation, tax implications, and asset division. The company emphasizes building long-term relationships with clients and tailoring their services to individual financial goals and priorities.

BIOS ➡ FOUNDERS | COMPANY LEADERS

WESTMINISTER AMERICAN INSURANCE COMPANY



JOHN SCOTT, JR.
PRESIDENT & CEO

Westminster American Insurance Company (WAIC), founded in 1869 as the Mutual Fire Insurance Company of Carroll County, is a commercial insurance carrier specializing in real estate coverage in the Mid-Atlantic region. Originally writing local home and farm owner policies, the company has transformed into a leading commercial insurance provider covering 12 states, with a particular focus on apartments, office buildings, and mixed-use properties along the I-95 corridor. In 2005, the company restructured under John Scott, Sr.'s leadership, growing from a single-state Maryland carrier with under \$4 million in premiums to a \$77 million commercial carrier by 2023. Recently, in June 2024, the Scott family reacquired the company from NI Holdings, Inc. for \$10.5 million, with John Scott, Jr. continuing to serve as President & CEO. The company maintains an "A" rating from A.M. Best and holds insurance certificates in 18 states, including Maryland, Washington DC, Pennsylvania, Virginia, and others.

WEGO CHEMICAL GROUP



MARC ESHAGHPOUR
BOARD MEMBER

Wego Chemical Group, a global, family-owned chemical supplier and distributor founded in 1978 and headquartered in Great Neck, New York. The company specializes in importing, supplying, and distributing chemicals, minerals, and raw materials across various industries, with a strong focus on sourcing competitive chemical supplies from the Pacific Rim, including countries like China, Taiwan, Korea, Japan, India, and Indonesia. With an annual revenue of \$600 million, Wego operates globally, maintaining over 30 warehouses across four continents and serving customers in more than 25 countries, offering comprehensive supply chain solutions and distribution services for industrial and specialty chemicals.

FSU

**JIM MORAN COLLEGE
OF ENTREPRENEURSHIP**



**JIM MORAN INSTITUTE
FOR GLOBAL ENTREPRENEURSHIP**

FLORIDA STATE UNIVERSITY | JIM MORAN COLLEGE OF ENTREPRENEURSHIP

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