



THE  
TOP  
100

# INNOVATORS and *Entrepreneurs*

*Featuring*

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& Productive Environment Institute**







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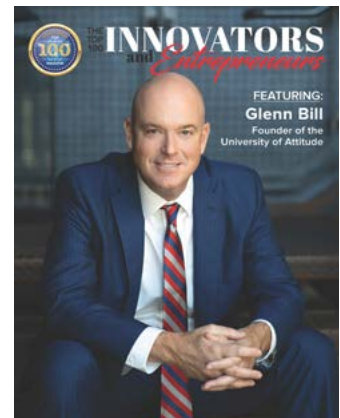
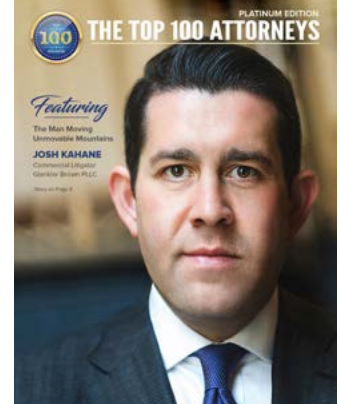
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The staff of *The Top 100 Magazine* would like to express their gratitude for having the privilege of working with some of the brightest, most accomplished, and esteemed thought leaders in the world.

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 most impressive publications to date.

I know that our readers will be equally enthused 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 Innovators & Entrepreneurs Magazine*.

*Joseph Nunziato*  
CEO, Redwood Media

# THE TOP 100 INNOVATORS and *Entrepreneurs*

## WHO'S INSIDE

- A-E: Arthur, Benjamin-76, Boissat, Philippe-63, Briscoe, Brian-50, Brown, Chris-81, Buckley, Ellen-75, Byrde, Brittany-84, Carney, Kimberly-20, Case, Josh-4, Cossette, Alison-61, Derda, Ryan-34, Dolan, John-69, Dominguez, Emilio-56, Doshi, Hermal-85, Emberland, Steve-67, Evans, Karen-87
- F-L: Fanelli, Dean L.-44, Gabourel, Stephen-36, Golden, Ben-18, Gonzalez, Jazmine-77, Gould, Dan-87, Gregorian, Greg-70, Grossman Ciobataru, Fabiana F.-73, Hemphill, Barbara-24, Henley, Melvin-42, Hoedebecke, Dr. Kyle-14, Holmes, Annie-71, Johnson, Robert-60, Hund, Michael-12, Huntington, Joy-66, Kallstrom, Matt-78, Kelly, Patrick-58, Khalil-Otto, Marya-57, Kidan, Adam-55, Kreider, Jason M.-38, LeGrange, Chandler-74
- M-R: Mahrat, Reem-28, Mantzouridou Onasi, Ionna-40, Milan, Christopher-62, Mohapatra, Susanta-22, Murtha-Bachmann, Denise-80, Pereira, Jennifer-83, Prasad, Rama-82, Raber, Barry-86, Rafalski, Matt-85, Rainis, Dorothee-48, Rajasekaran, Dr. Ayyappan K.-79, Rector, Lee-54
- S-Z: Scurlock, Frank Mials-32, Sever, Ben-86, Shahkarami, Sean-26, Soder, Dr. Dee-84, Sogbor, Sidney-46, Sonkin, Alex-52, Standal, Gregory-59, Storer, Emmet-8, Storey, Robynn-65, Strusinski, Matt-30, Terry, Katrina-64, Weaver, Kevin-16, Weiss, Jason-72, York, David-82, Zweig, Derek-68



**THE TRAILBLAZERS. THE LEADERS.  
THE CHANGE-MAKERS. THE DREAMERS.**

We bring the stories of extraordinary people to the world.







# Meet Josh Case:

## A Beacon of Resilience in the World of Renewable Energy & Beyond

In the dynamic and ever-evolving field of renewable energy, Josh Case stands out not only as an expert, but as a symbol of unyielding resilience. His incredible journey, marked by a courageous battle for sobriety, is a testament to the human spirit's capacity to overcome adversity.

Josh is confronting his struggles head-on, refusing to let them define him or his aspirations. With unwavering determination, he aspires to master sobriety and in doing so, rebuild the crucial relationships that have shaped his life. Moreover, Josh has committed to full transparency and is resolute in his decision to share his story openly. Through his experiences, Josh seeks to inspire others to face their own challenges with courage and determination.

Josh Case has proven himself to be a man of remarkable courage who is valiantly fighting to rise above his obstacles and emerge as an inspiration to us all. His story is a beacon of hope, reminding us that with determination and resilience, we can conquer any obstacle that stands in our way.

In the landscape of renewable energy, few names shine as brightly as Josh Case. Wearing multiple hats, Josh is a co-founder and board member of Energy Capital Group, CEO and founder of Panorama Holding Company (PHC) and Panorama Company (PC), an advisor to Powertechs, and holds a prominent position on the board of governors of the Salt Lake City Chamber of Commerce (SLCCC). With 100% ownership of both Panorama companies, and a significant stake in Energy Capital Group, Josh's impact on the energy sector is undeniable.

Over the past two decades, Josh has cultivated a rich tapestry of experiences spanning solar development, real estate, and finance. His expertise is not just limited to a single renewable source; Josh has been a vanguard in various sectors, including solar energy, wind energy, battery storage, and green hydrogen. His forward-thinking led to securing land and interconnections near multiple coal plants for renewable projects, anticipating the needs of the industry's future. This visionary approach leveraged existing transmission infrastructure, priming the industry for the eventual phase-out of coal generation. Moreover, his ability to spot opportunities in states traditionally deemed 'solar-unfriendly' showcases his knack for strategic foresight.

Throughout his illustrious career, Josh's association with some of the world's largest independent power producers has bolstered his reputation. Notable stints include his role as the former VP of Greenfield Development at ENGIE North America, and as the CEO and co-founder of Photosol US Renewable Energy (PURE). His associations with powerhouses like Tenaska, EDF Renewables, D.E. Shaw (DESRI), and BNP Paribas speak volumes about his credibility in the field. Yet, amidst his contributions to renewable energy, Josh's commitment to social impact is equally commendable.

His advisory role at Powertechs underscores his dedication to addressing the energy industry's human side, particularly in transitioning coal industry employees into the booming renewable sector.

Personal challenges, such as his recent journey towards sobriety, have only fortified Josh's resolve. As he embarks on this new chapter, his favorite saying rings especially true: "You don't know how empty you are until you start to fill up." That said, Josh has reentered rehab due to a relapse and realizes he is in for the fight for his life. He understands there is no simple fix for addiction—it's a lifelong journey and until he fixes himself, he cannot help other people. All the business success is secondary to his sobriety.

Educationally, Josh continues to evolve. While already holding degrees in geography and business management from Brigham Young University and an MBA from the University of Phoenix, he's currently deepening his expertise at UCLA's Department of Engineering and Digital Technology Leadership Mastery Program.

Josh's contributions haven't gone unnoticed. Accolades such as the *Green Business Award from Utah Business*, *Forty Under 40* recognition by *Utah Business Magazine*, and multiple mentions among the *Top 50 Financial Advisors* by Bank of America Merrill Lynch, serve as testaments to his prowess. Through his numerous publications, Josh also enlightens the industry. Pieces like *Solar Firm Buying Land Rights Near Coal Plants with an Eye Toward Transmission* and others further his commitment to a cleaner, sustainable future.

In essence, Josh Case stands as a beacon in the renewable energy domain, powering forward with innovation, resilience, and an unwavering commitment to a greener tomorrow.





# A Q&A WITH

The Top 100 Magazine is thrilled to present an exclusive interview with Josh Case, a trailblazing visionary and dynamic entrepreneur. With a compelling story of perseverance and innovation, Josh has captivated the business world with his remarkable journey to success.

In this candid conversation, we delve into his inspirational rise from humble beginnings to becoming a prominent figure in the global business landscape. Get ready to be inspired as we uncover the secrets behind his extraordinary achievements, gain insights into his unique approach to leadership, and explore his vision for the future.

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**Josh, you are clearly an authority on solar and renewable energy. Was this always a passion?**

I began in finance in 2002 and transitioned to Merrill Lynch by 2009. It was here that I was introduced to renewable energy projects and their financing, and when I realized it was the future. In 2011, I co-founded Energy Capital Group and spearheaded Utah Solar 1. I was among the first to position solar projects adjacent to coal plants, to repurpose the existing infrastructure for green energy. I also ventured into regions not initially seen as solar-friendly, predicting eventual shifts that we're witnessing today. I enjoy finding opportunities before others and patiently waiting for those moves to play out like we are now seeing.

**While you lead three extraordinarily successful companies in the renewable energy space, you're also lending your expertise to help drive the entire industry forward and help people transfer their skills in coal plants to green technologies positions. Tell us about this and why it's important to you?**

With the decline of coal plants, many skilled workers face uncertainty. Through Powertechs, we're developing AI tools to transition these skills to the renewable sector. These plants have been the backbone of many rural economies, and the switch to renewables can replace the lost tax base and offer new job opportunities. I believe in supporting these dedicated workers; they've powered our lives for years.

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**My new purpose in life will involve helping other successful people with their addiction issues.**

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# JOSH CASE

**As you help to transform communities and the environment, you've also experienced a personal transformation recently. Would you like to share that with us?**

Recently, I sought help for my long-standing issues with alcoholism and burnout. Undertaking rehab at Cirque Lodge made a huge impact, but I realized that I was not at the stage in my recovery where I wanted to be, so I returned to the program. Having a full understanding of addiction is essential and I want to do everything in my power to ensure my life embodies every aspect of what sobriety entails. I also want to help others with addiction problems like so many are helping me.

**What words of wisdom would you give to your younger self and/or young, aspiring leaders out there?**

Live authentically. Seek help when needed, prioritize relationships, and cherish life's moments. Success is multifaceted, and it's essential to be present in all of life's experiences. Finding your purpose in life is key, I believe. Also, recognize if you have an addiction problem, do not be afraid to seek help as soon as possible, and do not let decades slip away like I have done.

**As you embark on this new chapter of your life and career, what's on the horizon?**

My primary focus is on self-care and healing, being there for my children, as well as mending and reestablishing relationships I have damaged. Professionally, I'm taking a measured approach, currently advising Powertechs and considering a full-time return in 2024. Whether I venture into a startup again or join a large energy firm is still up in the air. Regardless, mentoring the next generation remains a passion. My new purpose in life, I have found, will involve helping other successful people with their addiction issues because I can relate to that, but first I must get myself into a position to do that. I believe aiding those people will help me just as much, or more, than them in my lifelong sobriety challenge.

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# Meet EMMET STORER

## The Cowboy Innovator Fueling America's Beef Industry

The American Cowboy. They are the original innovators and entrepreneurs whose legacy tells the story of resilience, ingenuity, and passion that fueled a growing country with beef. They weathered economic fluctuations, harsh weather conditions, and the occasional cattle rustler, crafted their own tools, from lassos to fences to rope, turning everyday objects into instruments of the trade—all to fulfill their role in feeding a nation. Their inventiveness, tenacity, and courage made them masters—and stewards—of the land who nurtured the American cattle industry, ensuring its productivity for generations to come. Ranchers are at once the guardians of tradition and the engine of innovation that continues to drive America forward.

Among these passionate figures stands Emmet Storer, a fifth-generation Nebraska rancher, and the founder and CEO of Platform Cattle, a distributor of innovation for the cattle industry. He's a pioneer of sustainable beef production and a passionate advocate for bridging the gap between consumers and individual ranchers. "An old cowboy once told me that the most expensive words in the industry are 'That's the way Daddy did it,'" Emmet recalls. As he helps to usher the country's ranching community into a new era, his story is a testament to the legacy of the American cowboy, and their enduring heritage of innovation, entrepreneurship, and unwavering commitment to deliver the highest-quality beef to kitchen tables across the nation for generations to come.

### Emmet's Family Legacy: From Frontier Haystacks to Sprawling Herds

Emmet's roots as a cowboy and an entrepreneur in the cattle industry reach back generations. His great-great-grandfather, Dan, arrived in the U.S. from Ireland at just 14 years old and settled in Nebraska, where he worked for a local rancher, saving every penny he could. Over time, he managed to purchase a few heads of cattle and a piece of land from the rancher, enduring the harsh conditions of the frontier, all in pursuit of a better life for his family. His indomitable spirit marked the inception of a family legacy that lives on today.

Emmet paints a vivid picture of his grandfather's determination. "For five years, as he was building it, he didn't have a house, he lived in haystacks, and several times the haystacks burned down, and he'd have to dig and hollow out another one," he explains. "He was in the middle of nowhere, near Coyote Bowl, just working relentlessly to earn a dime more than someone else, to gain an advantage

and build more for his family. Five generations later, I'm still here, and we still have the ranch that he started."

### The Rise of a New Entrepreneur & an Innovator for the Modern Age

Emmet's journey as a rancher and entrepreneur began as a youth. His parents gave him and his siblings a few cattle from the family's herd, depositing the money received from selling at auction into their savings account. In seventh grade, Emmet's entrepreneurial spirit and passion for cattle was clear when he used some of the money that he'd saved to buy 10 more cows. And so it was that a young rancher was born—with business savvy and forethought defied his years. He grew the herd to 50 heads, and used the income to pay for his college education, graduating from the University of Nebraska-Lincoln with a major in agricultural economics, a minor in agricultural entrepreneurship, and an emphasis on meat science. He established Signature Cattle LLC for his growing herd of cattle—and founded Platform Cattle determined to help his fellow ranchers thrive.





## Platform Cattle: A Distributor of Innovation Built By a Cattleman For Cattlemen

Based in North Platte, Nebraska, Emmet founded Platform Cattle in 2020 with a clear vision: to be a distributor of innovation for the cattle industry, taking practices and innovations used around the world and create products usable for the U.S. cattle industry—the biggest powerhouse of cattle and agriculture in the world. “Our mission is to build a brand that recognizes the lifestyle learned, the struggles earned, and the innovation created,” Emmet shares.

Like the cowboys before him, Emmet has wasted no time in the area of innovation. One of his most significant contributions to the industry is the creation of the Sustainable Beef Production Standard Program. This initiative embodies his unwavering commitment to sustainable practices and ensuring that the ranching industry is both environmentally responsible and profitable. The program sets rigorous standards for sustainable beef production, safeguarding the future of the industry, the land, and the generations that will come after.

As Emmet continues to eye new innovations, he’s equally focused on creating a stronger bond between beef consumers and individual, smaller ranchers, to revive the close connection that they once had. “As the world has gotten bigger, this connection has, sadly, gotten lost along the way. Consumers want to know where their beef comes from, the people behind it, and we want them to know who we are and our stories,” Emmet says.

While Emmet’s horse, Gator, is grazing, we had the pleasure to meet with him to hear what it means to be a “cowboy,” and learn more about Platform Cattle, the challenges of American ranchers, and how he’s delivering innovation to ensure American cowboys thrive in the modern cattle industry. And he shared some surprising facts that you might not know!

### A Conversation with Emmet Storer: The American Cowboy Behind Platform Cattle

#### What inspired you to start Platform Cattle and what makes it so unique?

Simply put, I knew my heart was drawn to the cattle industry and the people it brings together. Platform Cattle represents the innovation it’s going to take to cultivate the values that cattle provide on our plate, in our pastures, and for our culture. Cattle means more than just a commodity, to all of us that grew up in it, we learn a lifestyle only generations can teach and a passion that can only be inherited. That’s why Platform Cattle dedicates time to building a brand that stands for more, because that’s what this industry was built on.

#### What are the greatest challenges facing American ranchers today?

A relationship with consumers. There are numerous challenges in the industry, some come and go throughout the years. However, to re-establish a transparent relationship between those who raise the beef and those who buy the beef would diminish



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several of the other underlying challenges. For the generations of ranchers before us, there was always a connection between the consumer and the producer on some level. But now, that's getting smaller and smaller, and harder to find. We take great pride in being able to provide high-quality beef to the tables of families across America, and, as ranchers and producers, we want them to know who we are and our story.

Sustainability is another key challenge. Sustainable for the environment, sustainable for your operation, and sustainable for the population. We're producing more pounds of beef per head of cattle than we ever have before yet there are actually less cattle in the U.S. than there were 30 years ago. As ranchers, we need to continue to make our operations more efficient.

**How are you using innovation to help drive the cattle industry forward, and create value for ranchers across America?**

We're connecting demands with solutions that are effectively sustainable for both the consumer and our producers. The Sustainable Beef Production Standard is what I created to help do just that.

**Tell us a bit more about the Sustainable Beef Standard Program and how it could be a game changer for American ranchers and consumers alike.**

The Sustainable Beef Standard Program was created to ensure beef consumers with the direct reduction of cattle's carbon footprint. Consumers and producers both can also be assured that our standard is economically sustainable for producers to use in their operation. The goal of Sustainable Beef Production Standard is to provide sustainable beef to consumers in a way that is sustainable for producers to provide, and is helping to protect the environment as well.

**Emmet, can you share a few things about ranchers that the public might not know?**

A ranch receives most all of its revenue once or twice a year, that is when we sell our calves. The only exceptions are if we are forced to sell additional cattle such as unproductive bulls and cows. Our profit margins are actually fairly low, and they've been declining for about the last decade. Another thing people might not realize is that most of us run ranches that have been in our families for generations, and like our parents and grandparents—and those before—we're constantly innovating to overcome new challenges. We take great pride in the beef we produce for people. The same meat that they're enjoying in their homes in restaurants we're serving to our own families!

**Nebraska Beef is fast becoming all the rage among consumers and restaurants, known for its quality, tenderness, and extraordinary taste. What makes it so popular?**

Nebraska, particularly, can produce a quality product because our ecosystem provides the highest quality of natural resources that are ideal for cattle production. This, with the combination of people committed to the husbandry of their own land and cattle, makes a beef product that is second to none.



**You're also on a bigger mission to bring consumers and ranchers together as a community supporting each other. Why is this important to you—and consumers?**

From a business perspective, as the producer, it's essential to connect with the final consumer for feedback on our product to help us evaluate their demands and find ways to improve our product. I believe it is also essential for the consumer to know more about what they are consuming. By bringing ranchers and consumers closer together, I am hopeful this would build trust and revive the relationships that consumers and ranchers once had with each other.

**What does it mean to be a "cowboy," Emmet?**

To define a "cowboy," is to define a culture. Meaning that you really don't know the right words to describe it; but when you're around it, you know it. At our best we're fearless, passionate, eager to show strength, and yet quick to care for others. At our worst we're closed off, working hard by ourselves, and tend to be viewed as a "wild card" to those around us.





*From left to right: Founders Michael Hund, Jill Vedder, and Eddie Vedder of Pearl Jam*

# MICHAEL HUND

## The Extraordinary Ensemble United in the Epic Race to Save the Butterfly Children

Never before has such a diverse community of supporters banded together, propelled by a single, urgent mission. From music, sports, and film stars to big tech, biotech, and business leaders; hedge funds and venture capitalists to philanthropists, academia, entrepreneurs, and millions of people across the globe, this extraordinary ensemble's unified mission has grown into a worldwide anthem: To save the Butterfly Children.



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Led by Michael Hund, the CEO of EB Research Partnership (EBRP), it's an anthem fueled by innovation, philanthropy, and the unyielding spirit of humanity carried by the momentum of a symphony of voices from concert halls to boardrooms, from Main Street to Wall Street, together in a race to find a cure for Epidermolysis Bullosa (EB), a rare, life-threatening, and heart-wrenching pediatric skin disorder that affects 500,000 people—mostly children—that causes the skin to blister and tear easily. They are called "Butterfly Children" because their skin is as fragile as a butterfly's wings. They are little dreamers with boundless imaginations. They are inquisitive, they are loving, they are kindhearted. They are the bravest little warriors on the planet who endure unfathomable pain—and they are the center of a global effort to give them a chance to fly.

Founded in 2010 by a group of dedicated parents along with Jill and Eddie Vedder (Pearl Jam), EBRP is the largest global funder of innovative Epidermolysis Bullosa (EB) research and development with a mission to rapidly accelerate treatments and achieve a cure by 2030. Their list of supporters reads like a roll call of the world's most recognized names who know it is not a question of "if" a cure for EB will be found, it's only a matter of "when." The hope of "when" just rang out louder than ever with a monumental breakthrough.

### **A Historic High Note of Hope: First-ever FDA-approved treatment for EB, hope for all rare diseases**

In May 2023, Krystal Biotech's VYJUVEK™, the world's first-ever therapy for the treatment of Dystrophic Epidermolysis Bullosa (DEB), a rare and severe form of EB, secured FDA approval. This is not only the first-ever FDA-approved treatment for those battling DEB, but also the first FDA-approved topical, redosable gene therapy—and watershed moment that marks not only a groundbreaking a scientific achievement but the power of EBRP's innovative venture philanthropy business model. "More than 300 million people around the world are affected by a rare disease, yet 95% of rare diseases lack an FDA-approved treatment. Now, with an FDA-approval, EB warriors and our community proudly cross into the 5%," says Michael, who has spent his career dedicated to transforming health care for those battling disease, previously serving at the Multiple Myeloma Research Foundation and the actor Paul Newman's Hole in the Wall Gang Camp. "Having worked in service to the patient community for 20 years, these are the wins that we relentlessly fight for every day. And tomorrow, we will get up and continue fighting until there is a treatment for every patient and we achieve our goal of a cure" he adds.

### **Venture Philanthropy—Redefining the Score of Medical Research**

EBRP's Venture Philanthropy business model has been highlighted for its leadership by Harvard



*From left to right: Actor Tom Holland and Michael Hund*

Business School, Yale University, and MIT in helping to fast-track not only a cure for EB but therapies that could affect thousands of other rare diseases. When making a grant to a research project, they retain the added upside of generating a recurring revenue stream if the therapy or product is commercially successful, then use the return on investment to fund additional EB research until a cure is found. Since inception, EBRP has raised over \$50M, funded over 120 EB projects and contributed to an astounding 20-fold growth in EB clinical trials.

EBRP invested in Krystal Biotech in 2017, shortly after Krystal Biotech's initial public offering of common stock. The investment was made via a private placement of Krystal Biotech's common stock, and as part of the stock purchase agreement, Krystal Biotech committed to commence a Phase I clinical trial of VYJUVEK. The funding followed the highly competitive application and screening process overseen by EBRP's Scientific Advisory Board (SAB), which is composed of leading scientists and physicians. EBRP was able to generate a more than double return on its investment and reinvest that capital back into more EB projects. But their goal extends beyond EB. "A rising tide lifts all boats, and we feel a responsibility to take what we've learned and share it with the rare disease community to accelerate their goals to deliver hope and healing for the communities they serve," Michael shares.

### **Venture Into Cures—3 Events, 3 Years, over \$6M Raised by a Symphony of Supporters Committed to Finding a Cure**

Over the past three years, a constellation of celebrities has joined together in this inspiring digital event that has raised incredible awareness and funds for EB: Eddie and Jill Vedder, Billie Eilish, Will Ferrell, Tom Holland, John Legend, Chris Pratt, Keanu Reeves, Olivia Rodrigo, Emma Watson, Red Hot Chili Peppers and more. But the rhythm didn't stop there, with support carried by forward by philanthropic giants and foundations like the Deshe Family, Helmsley Charitable Trust, Hearst Foundations; biotech heavyweights Krystal Biotech, Abeona, and Amryt; and corporate titans like Amazon Web Services, CIBC Innovation Banking, Jefferies, and Deloitte. "Through the ongoing support of the Venture Into Cures' audience, donors and the patient and medical communities, we will continue to fund the most innovative and impactful global research, and we will not rest until we find a cure for EB and beyond," says Michael.





# DR. KYLE HOEDEBECKE

Co-Founder and Chief Medical Officer of Juna Health  
Founding Partner of 1836 Ventures

*In the rapidly evolving world of health and technology, companies and clients alike require guidance from those who not only understand these industries, but are deeply entrenched in their development. Enter Dr. Kyle Hoedebecke.*

*With his rich tapestry of experiences, Kyle's reputation is one of excellence, commitment, and innovation in the health and tech arenas. As the cofounder and chief medical officer of Juna Health and founding partner of 1836 Ventures, he is strategically positioned at the intersection of modern medicine and cutting-edge technology. This board-certified family physician isn't just about theoretical knowledge. He's about actionable results, leading in metrics such as quality, safety, patient satisfaction, and more. His expertise doesn't halt there; in the startup environment, Kyle has advised and mentored more than 45 startups, and personally invested in several.*



Juna Health, founded in 2021, stands as a testament to Kyle's vision. This novel clinic swiftly addresses high-demand medical areas, while being inclusive and prioritizing accessibility for patients. From its initial offerings of sexual health services to its recent expansion into weight loss, insomnia, and behavioral health, Juna has displayed a keen ability to anticipate and meet the evolving needs of the community. Their approach to healthcare isn't just effective; it's engaging, as evidenced by their viral presence on platforms like TikTok and Instagram.

Concurrently, as a founding partner at 1836 Ventures, Kyle's role pivots to the financial and strategic, evaluating promising healthcare investments and mentoring the next generation of startups. Just as with Juna Health, innovation is at the core of 1836 Ventures, with a deep-rooted commitment to transforming technology-forward portfolio companies and guiding them to their zenith. Although 1836 Ventures opened its doors in 2023, the Houston-based company is already making waves. With the support of its experienced co-founders, who leverage their entrepreneurial, go-to-market, and stage expertise, 1836 Ventures not only provides a roadmap for success, they accompany their clients throughout the entire startup journey.

For potential clients, partnering with either Juna Health or 1836 Ventures isn't just about tapping into the current pulse of healthcare technology; it's about aligning with a vision for the future. It's about realizing that in the vast field of health technology, having someone like Kyle, with his multifaceted expertise and unwavering commitment, can make all the difference.

We spoke with Kyle to learn more about his dual roles and how he became involved with Juna Health and 1836 Ventures.

### **Why are you driven to help others and volunteer? Why medicine?**

From a young age, I've been fascinated by the intricacies of the human body and driven by a desire to positively impact my community. My family has a strong tradition of volunteerism; my parents were avid volunteers, and like my father and brother, I earned the Eagle Scout rank. This commitment to service extends to a military legacy tracing back to World War II, with my own contribution spanning 17 years in the U.S. Army. After my military service ended in 2019, I transitioned to Oscar Health. While my role as a doctor allows me to make a difference one patient at a time, my entrepreneurial endeavors have the potential to benefit countless individuals.

### **What inspired you to start Juna Health?**

During my final years in the military, I observed a concerning rise in sexually transmitted infections. Recognizing that this surge among military personnel mirrored national trends, my co-founder and I discerned a pressing need for a solution. This insight led to the establishment of Juna. We identified that the societal taboo and associated embarrassment surrounding STIs deterred many from seeking timely medical intervention. At Juna, we promote proactive testing for all sexually active individuals. While preventive screenings like those for chlamydia are available for heterosexual women, there's a significant gap in services for heterosexual men, the

LGBTQ+ community, and other marginalized groups. Juna aims to bridge this disparity.

### **What makes Juna so unique? What services do you offer?**

Juna provides swift concierge medical services, distinguished by 24/7 access to our physician team, ready to address a broad spectrum of medical concerns at a single, convenient location. We foster a genuine connection with our patients and their communities through transparent content on social media platforms, including TikTok, Instagram, and Facebook. Moreover, our ever-expanding array of tests and treatments is delivered right to the patient's doorstep.

### **While you're leading Juna, you also serve as an angel investor and advisor for other healthcare technology startups. Why are you so passionate about helping other entrepreneurs succeed?**

Aiding other entrepreneurs aligns with my mission to create a healthier world. Through technological innovation and improved healthcare systems, I can influence positive outcomes on a grander scale. I love seeing other entrepreneurs succeed and helping them wherever possible in their journey.

### **This brings us to 1836 Ventures. Tell us about your role, and why you decided to become involved.**

At 1836 Ventures, my medical background lends a unique perspective, allowing me to evaluate investment prospects from both clinical and payor viewpoints. This partnership amplifies my influence on healthcare's future while offering Americans promising, secure investment avenues.

### **How is 1836 Ventures different from other VCs?**

We stand apart by emphasizing revenue-generating companies. Our hands-on involvement spans 3 to 5 years, post which we navigate the startups through the acquisition phase.

### **Physicians usually see patients; however, you're making a difference outside the traditional clinic setting. Why did you choose this route?**

To achieve my goal of maximal positive healthcare impact, I've recognized the potency of influencing medical systems on broader national and international scales. By channeling my expertise outside the traditional clinic, I can touch countless lives annually, magnifying my impact.

Kyle's robust educational background includes an MD, an MBA, a Master Public Administration, an MS in leadership, and a Master of Telemedicine and E-Health. He is a fellow of the American Academy of Family Physicians, a fellow of the American Balint Society, and a Certified Physician Executive. In addition, Kyle's devotion to public service garnered him the *President's Lifetime Achievement Award* from the White House; presented to him by President Joe Biden. Notably, Kyle was also selected as the *Army Physician of the Year* by the Surgeon General.

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# KEVIN WEAVER



## Leading the Warrior's Journey Towards Healing Invisible Wounds

In the world of veterans' service organizations, few names shine as brightly as The Warrior's Journey (TWJ). Established in 2015 and headquartered in Springfield, MO, with an additional office in Germany and satellite locations within the Continental United States, TWJ has been a beacon of hope for veterans facing invisible wounds – those often-overlooked scars that can lead to isolation, addiction, and tragically, suicide.

At the helm of this remarkable organization stands Kevin Weaver, a man whose life journey has been intricately woven with a profound commitment to serving his country and supporting those who bear the burdens of military service. As the co-founder, president, and CEO of TWJ, Kevin has not only carried the torch of his family's longstanding tradition of service, but has also emerged as a recognized and sought-after expert in the field of military resiliency and invisible wounds. Under Kevin's visionary leadership, TWJ has evolved into a premier veteran's service organization, receiving special recognition from the Department of Defense, government legislators, and the U.S. Army Chaplains Corps. Thus far, TWJ has provided resources and services to over 2 million warriors and military leaders, and they have extended ongoing support to over 15,000 warriors and their families.

TWJ's mission can be distilled into two critical pillars: Prevention and Intervention. They understand that while there are outstanding organizations addressing the physical wounds of combat, the invisible wounds often remain unnoticed, leading to brokenness and despair. TWJ, in collaboration with a data team at The Harvard School of Business and the United States Chaplain Corps, has diligently identified the most common challenges faced by our warriors. Their efforts have resulted in the creation of preventative resources aimed at educating and preparing them for their military journey and beyond. Moreover, TWJ recognizes that moments of crisis are not confined to the battlefield. The stress of reintegration, the enduring effects of survivor guilt, and feelings of isolation, loss, and moral injury can surface at any time. To address this, TWJ has assembled a team of veterans who offer real-time crisis intervention. Confidential and empathetic, these veterans serve as personal advocates, or "battle buddies," guiding their fellow warriors through the healing process.



Kevin's connection to the military runs deep, stemming from generations past. His great-great-grandfather's service during the Civil War planted the seed of duty and honor in his family tree. Kevin's father, a government contractor during the Vietnam War, played a crucial role in aerospace defense and engineering, supporting the war effort. It was



through these familial ties that Kevin's dedication to serving his country was nurtured. Kevin's personal journey took him into the U.S. Air Force, where he served in the Security Forces at the 24th Security Police Squadron and with the Office of Special Investigations at U.S. Southern Command in the Republic of Panama from 1983 to 1987. He also spent 32 years as a minister with a focus on support to military members, veterans, and their families before founding TWJ, showcasing his unwavering commitment to both faith and service.

Kevin's dedication to service and leadership have illuminated a path towards healing invisible wounds for countless veterans. We spoke with Kevin to learn more about why he started The Warrior's Journey and how it differs from other VA programs.

### **What prompted you to start The Warrior's Journey? Was there a specific instance that motivated you?**

When my nephew, a Marine, graduated high school, he was sent to Iraq and saw combat during the First Wave at Fallujah. When he completed that tour, he was part of just a few in his unit who weren't wounded or killed. That experience left him with a lot of invisible challenges, and he turned to me for support. I didn't know exactly how to help him, but I had some limited combat experience while serving in the USAF, so he trusted me. We spent quality time talking, but mostly, I just listened. In 2006, he was deployed again as a Marine sniper. Tragically, his company commander was killed during that deployment. When my nephew returned home, he greeted the commander's wife. She hugged him and said, "Thanks for taking care of my husband." My nephew had difficulty processing that. Through further intimate talks with him, I witnessed how he gained strength by verbally processing these traumatic experiences. I truly believed if we could create a group of military members and veterans who could listen to others who are serving or have served, it would work as a profound, cathartic opportunity bringing healing. So, The Warrior's Journey was born, and so much of our development was inspired by the healing conversations I had with my nephew.

### **Kevin, what is the most common obstacle that prevents service members from seeking help?**

We discovered that this obstacle varies by gender. For male service members, a prevailing obstacle is a sense of duty and stoicism, where they often feel the need to "buck up" and ignore their emotional or mental challenges in favor of fulfilling their mission. This can lead to them remaining silent and carrying on despite their struggles. On the other hand, female service members commonly face obstacles related to sexual trauma or abuse, with many cases going unreported. Overall, the belief that they cannot relay or discuss their need for help and the fear of vulnerability are significant barriers to seeking assistance.

### **How is The Warrior's Journey unique from other veterans' organizations?**

The Warrior's Journey is unique in several ways. First, all the services we offer are entirely free to military personnel, veterans, and their families. This inclusivity ensures that financial



constraints do not hinder access to vital support. Secondly, we provide a comprehensive range of services in-house, including transitional support and leadership coaching. We also operate a robust case management system and have a network of 200 warrior connectors who can offer guidance and support. We have successfully prevented over 1,800 suicide scenarios, ensuring no lives were lost. Lastly, what truly sets us apart is our holistic approach; we address the well-being of the mind, body, soul, and spirit of those we serve.

*Kevin holds a BA in pastoral ministries and missiology and an MA in organizational leadership. He has also received a Certificate of Leadership Development on National Security and Strategy from U.S. Army War College, Professional Coach Certification from International Coach Federation, and completed programs for Harrison Assessments Debriefing & Coaching, as well as Harrison Assessments Employee Development.*

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# Talking Tax Solutions with

# BEN GOLDEN

## CEO OF GOLDEN TAX RELIEF

As a certified tax planner, Ben Golden knows the IRS code—all 70,000 pages of it. That diligence and dedication is what his clients, including over 1,000 companies, find when they take their tax headaches to him at IRS Trouble Solvers and Golden Tax Relief. With a vast store of tax and financial knowledge, Ben, as CEO, and his team serve not only as tax professionals, but as advocates and educators to ensure everyday people don't get steamrolled by an impersonal system. His unwavering dedication to standing up for clients earned him ranking among Inc. 5000's *Top 500 Fastest-Growing Companies* in 2022 and 2023.

Even before he founded Golden Tax Relief in 2017 and IRS Trouble Solvers in 2020, Ben always had the philosophy of an advocate. During the 2010 BP oil spill disaster, he saw firms charging as much as 40% for claims. Inspired, he started charging 8% at his own accounting firm, HSG Accounting, which he sold in 2014, and was able to help 500 Panama City, Florida-area companies.

Today, IRS Trouble Solvers and Golden Tax Relief focus, respectively, on helping people resolve issues with the IRS, and helping people reduce their taxes through strategic planning. Their dual standpoints of audit and resolution make them uniquely capable of taming even the thorniest of tax problems, and providing clients with tax knowledge and much-needed peace of mind. "Two questions need to be answered: One, can I pay what the IRS says I owe? Two, do I really owe that amount?" Ben explains. "It's so important to advocate for the client as much as possible. It's really a passion because I still believe the IRS can bully taxpayers who don't know they have the right to be represented."

We spoke with Ben to learn more about what inspires him every day to help those in need.

**Tell us about the unusual personal experience you had, and how it inspired IRS Trouble Solvers and Golden Tax Relief.**

Early in my career, a client who owed \$171,000 to the IRS had a revenue officer at their door, wanting immediate payment, which wasn't possible. A few months later, that same officer came to my home saying she'd looked into my finances and that if I sold everything and liquidated my 401(k), I could pay

the balance for the client. I said, "Ma'am, I don't personally owe this money," and she said, "Yes, you do." She thought this because I'd put myself on the client's payroll so I could sign checks for payment, but she didn't realize there was a contract barring me from making decisions for the client. What's more, she'd looked into my finances without completing the necessary 4180 interview, breaking policy. I called the territory manager, and, as a result, the officer was penalized, and while the client was able to pay, I was never held responsible. I tell everyone this story because it illustrates how having knowledge of taxes can make all the difference.

**What are some of your other memorable stories to come out of your career?**

We've truly had some amazing stories. There was one young lady who owed \$37,000. Her husband had become disabled, so she was the caretaker and the only one working. Due to her circumstances, I was able to negotiate with the IRS so that she ended up owing only \$1,400.

I had another client owe millions; they paid their taxes, but didn't file certain forms. I made sure those forms were filled out correctly, allowing me to prove to the IRS that the penalties were the result of a different professional, not the client, and ended up saving them \$22 million.

**What is it about your values as a company that allows you to triumph for clients like this?**

I always push "not *if*, but *when*." That means always being ready to take care of someone when they need it, whether that's an employee or a client. Management makes sure employees are well cared for, so they in turn can care for clients. When, not if, someone stumbles, the team is poised to hold them up. When employees are happy and fulfilled, they happily take care of clients.

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

I love helping people, and I truly enjoy it. I don't think there's a whole lot I can't do, and I'm not afraid of a challenge. When others say no and leave people for dead financially, I'm excited to come put the pieces back together.

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# Meet KIMBERLY CARNEY

Imagine a world where brands and consumers seamlessly connect, where real-time data on shopping preferences and trends shape the future of fashion and beauty. This is precisely what Kimberly Carney envisioned—and then she brought it life. She is the passionate architect and visionary founder and CEO of The Wires, a game-changing collective of global B2B2C shopping platforms that have captured the hearts and minds of consumers across the globe—and transformed the digital retail landscape forever.

With nearly 1,000 brands and over 75,000 products across FashWire and GlossWire, “The Wires” mobile shopping apps rank among the top downloads for paid shopping apps. Affectionately known as “the Tinder of fashion and beauty,” the apps amass over 500,000 swipes per month from global consumers. Now *that’s* a lot of love. The Wires operates as a two-sided marketplace, empowering consumers to provide real-time feedback through swipes, likes, and shares that assists emerging and established designers and brands in reducing production costs, and guides strategic decisions for future collections. “We are designer and brand advocates; we’re not product driven. It’s about building relationships with them, focusing on their purpose, giving them a voice, and helping them succeed,” Kimberly says. And she means it because she’s been in their shoes.

In 2018, Kimberly’s background as a former boutique owner and over two decades of marketing experience in wireless and tech companies converged with the launch of FashWire, a first-of-its-kind platform that connects fashion designers worldwide with consumers, while gathering real-time data on shopping preferences and trends. The new concept took off with FashWire catapulting over industry leaders to snag the *Best Fashion Marketplace* accolade at the 2022 Glossy Fashion Awards. In quick succession, GlossWire was born, making The Wires a global sensation that saw Kimberly honored with the prestigious 2023 *Entrepreneur of the Year Award* from Fashion Group International. Today The Wires is not just a company, it’s a vibrant global community of brands, influencers, and consumers in a movement that’s transforming the digital retail industry and changing lives—one swipe at a time.

We spoke with Kimberly to learn more about The Wires, her passion for philanthropy, and the limitless possibilities on the horizon.

**Your inspiration for The Wires, and your passion for helping other brands, came from your own experience as a boutique owner. Will you tell us a bit about this?**

Having worked in the marketing and the tech industry for companies like AT&T and Microsoft, I opened a clothing boutique in Seattle in the early 2000s. As target marketing and behavioral data began to be used by companies to help project sales, this became a key factor in buying inventory. At the same time, smaller brands kept wanting to sell their products in my store. I thought there must be a way to connect consumers and brands, and in a way that brands could benefit from knowing what consumers liked or didn’t like in real-time. This inspired FashWire, which we launched in 2018 with 25 brands, and now we have nearly 500 brands on the FashWire platform from around the world.

**Consumers are gobbling up The Wire’s merchandise and new brands are joining every day. Why all the love?**

It’s been so great to see consumers get behind the app and our brands. They’ve deemed us “the Tinder for fashion and beauty.” They swipe right if they like it, swipe left if they don’t. We’re so passionate about helping emerging brands, supporting them, giving them exposure to help them grow and thrive, and this real-time feedback from likes, swipes, and purchases is invaluable for them to make better production, inventory, and design decisions. Consumers appreciate having a voice and being able to influence the brands they connect with and the products they produce. The interactive nature of The Wires creates a deeper level of engagement and connection between consumers and these amazing brands and designers from across the globe. It is truly a community thriving together.

**From a business perspective, to what do you attribute the extraordinary success of The Wires?**

Without a doubt, my team. They are awesome. I put the best of the best from the industry together, and they are just as passionate about this as I am. They are so amazing and brilliant, and I think that is a huge part of our success. I could not have done this without them.

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**You're also passionate about philanthropy. In fact, the entire "Wires" community is involved. Tell us about this.**

Philanthropy is an integral part of The Wires. Through our "dollar a download" initiative, we contribute to nonprofits every month. We have raised over a hundred thousand dollars for charitable organizations that support social causes. By partnering with Why Not You Foundation, St. Jude Children's Research Hospital, Gifting Brands, and other notable organizations, we make a tangible impact, and our consumers love this about us. Additionally, we host the quarterly FashPitch and GlossPitch competitions, providing emerging fashion designers and beauty brands with a chance to win \$10,000 and gain industry support, exposure, mentorship, and funding.

#### **What's next for The Wires, Kimberly?**

We have some exciting developments in the pipeline, including PawWire, which will be the same immersive platform catering to the \$100B+ global pet market. Our focus will continue to be on enhancing our technology and leveraging AI and AR to provide a better user experience, greater personalization, and more valuable data for our brands. We are also aiming to reach 1 million downloads across all our mobile apps by the end of the year. Stay tuned!



“

We are designer and brand advocates; we're not product driven. It's about building relationships with them, focusing on their purpose, giving them a voice, and helping them succeed.



# A Green Revolution in Oil and Gas:

## An Interview with **Susanta Mohapatra**, CEO & CTO of CrudeChem Technology



unfolds in state-of-the-art laboratories, equipped with cutting-edge analytical tools that fuel the creation of innovative products. The company boasts modern reactors and blending equipment that manufacture specialty and raw materials, positioning CrudeChem as a trusted, low-cost, high-efficiency chemical and service provider.

With corporate headquarters in Brookshire, TX, as well as locations in Midland, TX, and Washington, PA, CrudeChem Technology's footprint spans nationwide. Its influence extends internationally, collaborating with operators, oil service companies, and distributors across the lower 48 states and beyond. Under Susanta's adept leadership, CrudeChem stands as an experienced, trusted leader in oilfield chemical solutions and services, seamlessly bridging innovation with environmental responsibility.

### **Did you always have an interest in the oil sector?**

I did my PhD in oil and gas chemicals. I was a professor for a long time, often invited as a keynote speaker at prominent conferences. While I worked on green and renewable energy sources, I also recognized the need to make oil and gas production safer and more environmentally friendly. With the knowledge and expertise I had, I saw the opportunity to revolutionize the industry. We're developing both traditional and green products, making oil and gas production greener and safer. For instance, I hold patents for converting coffee grounds and woody biomass into biofuel.

### **What inspired you to start the company?**

Entrepreneurship has always intrigued me. Observing the market downturn and the challenges many companies faced, I saw an opening to develop effective products. One Sunday, I decided to take matters into my own hands. I quit my job and began this new adventure the next day. Starting in my garage, I mixed products and shared them with clients. Their positive response encouraged me to keep going. What started with one product has now expanded to over 100. We've grown from small orders to a \$70 million per year business.

Meet Susanta Mohapatra, a visionary green chemist, and a relentless entrepreneur dedicated to revolutionizing the oil and gas industry. Armed with a passion for sustainability, Susanta embarked on a mission to replace toxic practices with eco-friendly alternatives. Holding dual titles as chief executive officer and chief technology officer, he spearheads growth strategies, fosters collaborations, and pioneers new technologies, propelling his company CrudeChem Technology to soar from a humble garage startup to a formidable \$70 million annual powerhouse within just seven years.

At the heart of Susanta's success lies his specialization in team leadership, new technology and product development, and strategic growth. He founded CrudeChem Technology in 2016 alongside friends Jose Ojeda and Miles Grendel, driven by the ambition to engineer efficient specialty products for oil field and water treatment applications. Their journey



**Tell us a bit more about some of your services.**

Our focus on infrastructure and service sets us apart. We've invested in advanced equipment like reactors and blenders. We even have our own trucking services and offer field technical support. Our mobile teams of technicians and engineers visit the field to ensure proper chemical levels and analyze water and oil quality. We're a comprehensive specialty provider, handling everything from designing chemicals to delivering them and offering field engineering support.

**To what do you attribute CrudeChem's extraordinary success?**

Our success is a result of excellent products and exceptional service. We realized there was a gap in the industry—insufficient attention to service quality and scientific innovation. We've managed to keep technology and manufacturing costs low while providing top-notch products at competitive prices. By manufacturing our own products and focusing on service, we've earned customer loyalty. Their recommendations have been pivotal to our growth from a two-person team to over 50 dedicated staff members.

**You do a lot for the community. Where does your motivation come from?**

My motivation stems from my parents' teachings. My dad's mantra has always been, "Be a good human being. Prioritize goodness over money, and success will follow." In the past seven years, we've been actively involved in charity work, supporting communities and schools. My parents take pride in the positive impact we've made, which matters more to all of us than financial success.

**Q: Your academic achievements are impressive. How do they contribute to CrudeChem's innovation?**

My educational background has been instrumental in driving innovation at CrudeChem. With a PhD in chemistry and postdoctoral work in chemical engineering, I've had a solid foundation to develop groundbreaking technologies. This knowledge has allowed us to create products that are not only effective, but also environmentally friendly. Additionally, being featured in esteemed publications like *The Wall Street Journal*, *The New York Times*, *The Economist*, and *The Washington Post* has helped spread the word about our mission.



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LI: Susanta Mohapatra



# Meet Barbara Hemphill

“Organizing is not about decorative bins, baskets, or digital folders. It’s about the emotion, the memories, or the challenges that live in that clutter, and unwrapping them to find your purpose, your goals, ambitions—joy.”

Barbara Hemphill was a well-known brand before “personal branding” was a thing. She was a recognized authority in the organizing industry long before it was popularized—in fact, she participated in the creation of the entire field, back in 1978. And for anyone who hasn’t seen her on *Good Morning America*, *The Today Show*, *CNN Nightly News*, and other media outlets, or read her best-selling books—including *Taming the Paper Tiger*, the veritable organizing bible for people the world over—well, they’d be in the tiny minority. The passionate founder of Barbara Hemphill LLC and the Productive Environment Institute, she is the definition of a pioneer and a visionary. But to the thousands of individuals, business leaders, and entrepreneurs who’ve benefited from her expertise or her wildly popular Vision Accelerator program, she’s an absolute force—and her surprising approach has people everywhere reexamining their physical and digital environments.

“Clutter is postponed decisions®,” says Barbara. “Organizing is not about decorative bins, baskets, or digital folders. It’s about the emotion, the memories, or the challenges that live in that clutter, and unwrapping them to find your purpose, your goals, ambitions—joy.”

Helping people create a productive environment has driven Barbara for over four decades. It’s a passion that saw her named among *Power 20* by *Formidable Woman Magazine*, as a two-time recipient of the *President’s Award* from the National Association of Productivity and Organizing Professionals, the recipient of *100 Women to Know in America*, as well as *The Founder’s Award* from Doing Good at Work.

We had the pleasure of speaking with Barbara to hear more about her approach, Vision Accelerator, stories from those she’s helped, and one simple action to start tackling the clutter for good.

**You have a fascinating view of “clutter” and what “organizing” means, which you talk about in your book *Less Clutter, More Life*. Many people view it as physical (or digital) chaos that they must clean up. But you see it as a reflection of emotional pain, fear, or loss—and a journey to finding one’s purpose that’s buried beneath it. Will you tell us more about this?**

“Clutter” is anything that prevents you from accomplishing your work or enjoying your life. “Organized” is organizing what you can control to cope with what you can’t. Organizing in and of itself has no value; spending time organizing without a vision will significantly diminish your profit, productivity, and peace of mind. I started my career organizing physical clutter and quickly recognized that the real problem was not the clutter itself, but the emotion behind it. I was autographing *Taming the Paper Tiger* at a bookstore in New York City, and I stated that when I have a client who has difficulty “letting go,” I find that if I ask enough questions, the client will reveal an emotional loss.

Months later, I was speaking for a group of professional women at a university, and a woman approached me and said, “You just saved my marriage! I came to this conference with the intent of returning home to tell my husband of 13 years that I was leaving because of all his clutter. I didn’t realize until I heard you that it isn’t that he won’t clear the clutter, but he can’t. His mother died when he was seven.” Awareness of a connection between emotional loss and clutter is sometimes enough to inspire action.

**What are some of the most common reasons holding people back from tackling the clutter?**

Papers, emails, and digital documents accumulate on desks, computers, and the cloud because we haven’t decided what we need or want to keep or where to file it to find it later. A big stumbling block to letting go of clutter is fear: fear of letting something go and wanting it again or fear of the size of the project. Progress starts with the truth, so identifying and admitting your fear is a big step toward success.

**Your Vision Accelerator is one of the most popular organizing programs, Barbara. What makes it so different?**

I often ask audiences, “If you left this world tonight, what regret would you have?” The answers vary widely, from failing to pursue a lifelong dream to regret about the mess they’re leaving for their loved ones. But their answers are a form of clutter—something that’s preventing them from enjoying their life. That’s what Vision Accelerator is all about. Many people underestimate what they can do or achieve. What they need is encouragement and accountability. I’ve watched clients spend hours, months, years agonizing over the personal property they’ve collected and intended to leave as a legacy, only

**"I believe God created everyone with a dream, and our world desperately needs people with big dreams."**

to discover that their children don't want it. They feel overwhelmed and disappointed, only to find through our work together that their *story* is the most significant legacy they can leave their children.

**What is one little action someone can do today to move forward or get "unstuck?"**

Begin by asking, "What is ONE thing that has to happen for me to be happy with my progress in organizing my life or business?" I didn't say "the most important thing," and I didn't say "to be successful." It might be something minimal, like clearing the clutter off my desk, or something big, like "Sell this business, and do something I love." Then ask, "What next action can I take to move in that direction?" Often, we underestimate the power of incremental change. Research shows you are 67% more likely to accomplish a goal if you have an accountability partner, so don't hesitate to ask for help.

**So, we have to ask... What's your next action, Barbara?**

I believe God created everyone with a dream, and our world desperately needs people with big dreams. When I was president of NAPO in the '90s, my theme was "Together We Are Better," and it's become the theme of my businesses and my life. My focus is to use the speaking platform to spread my passion for eliminating clutter in every form, to accelerate the vision of everyone within the sound of my voice, and to partner with other dreamers to create more together than we can alone!

**BARBARA  
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# SEAN SHAHKARAMI



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We focus primarily on optimizing sales and marketing. Our theory is by growing revenue we grow companies, and as companies grow, they hire more people.

Sean Shahkarami is a dedicated problem-solver, an innovator, entrepreneur, and author. He's also a champion of the people who remains steadfast in his focus on helping others reach their full potential. As a peak performance coach, Sean moves people to breakthrough moments, providing a foundation for transformative experiences that change lives. His latest penned work, *Resonate*, reveals lessons learned over the course of a decade-long journey.

In the corporate space, Sean is also the founder and CEO of Opilio LLC. Launched in July of 2023, the Texas-based business offers custom AI and machine learning software solutions that automate complex processes, identify correlations in data driving revenue growth and intelligent lead generation, and predict future business outcomes.

We sat down with Sean to learn more about his own inspiration, what makes Opilio so different, and his deep-rooted desire to make a difference for clients and colleagues alike.

## What inspired you to start Opilio?

I was always into technology, but I never thought that AI and ML would have an effect on me because my job was M&A, and every deal is different with a lot of complex nuances, so there was no way it could be automated. Then about a year ago, it dawned on me that maybe it *could* be automated. So, I figured out how to do it. I wanted to maximize my value and leverage that technology in a way that still keeps humans relevant and valuable and offers our clients something different. I raised money with friends and started our own custom AI and ML business—Opilio.

## What makes Opilio unique from other companies in the space?

First, the tools that we build for our clients; we keep all that information private within their own infrastructure and give them the rights to it; we build IP for our customers. Then we

coach them on how to monetize that data with a secondary revenue stream that's also passive by monetizing the ML models that we build along with the data.

Second, we focus primarily on optimizing sales and marketing. Our theory is by growing revenue we grow companies, and as companies grow, they hire more people. We create an ideal customer persona for our customer that reflects the top 20% of their historical customers, so the most loyal, revenue-generating customers they have, and then we prospect using machine learning based on that customer persona.

**You're also a peak performance coach. What inspired you to start this venture? How is your approach different from others?**

When I was first promoted to director during my previous tenure at Grant Thornton, I had so many personal and professional obligations and responsibilities that I noticed I couldn't focus. I would walk into a room and forget why I walked into the room. I found a program through the Flow Research Collective and trained with them for a year to become certified as a high-performance coach. One of their missions is for people who go through the program to help further that knowledge and education because it's completely opposite of our modern-day society. So that's what inspired me.

In my own coaching, I take a very deep dive into getting to know the person and their goals, and I challenge them through questions to really allow them to reflect and become introspective about what's going to make them ultimately fulfilled. What I do differently is I personalize it more. Science is science, but what works for one person may not work for another.

**You're also helping people learn AI to complement their current skills and keep them valuable in the years to come. Tell us about your program.**

The most recent research articles about AI in the workforce estimate that 50% of jobs will be diminished or disappear due to AI and ML over next five years. We're helping individuals and executives by giving them the tools they need to thrive. Our premier product is an enterprise-level platform where we build our AI and ML applications. We have 6-month and 12-month programs that are like a university course where users get the benefit of real-world application, so they leave the course with tangible skill sets that will keep them valuable over next five years.

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

Helping people. I've done a lot of things in my career and been very fortunate, but of all my achievements, the greatest satisfaction I got from my job at Grant Thornton was not the metrics, it was that every person I coached on my staff all got promotions, and all became better professionals.  
*Sean is a CPA and CFF.*



**O P I L I O**  
S H E P H E R D F O R W A R D

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We're helping individuals and executives by giving them the tools they need to thrive.





# Reem Mahrat

During the long, dark months of COVID-19, medical researchers raced to develop a solution to save humanity from the deadly pandemic. Reem Mahrat was among them—and she was determined to make a difference. She’s the visionary co-founder and CEO of RamanID, a new sensing and diagnostics technology company with a groundbreaking platform that allows instant, seamless, and simultaneous detection of pathogens—whether the flu, COVID, or other infectious diseases. The test can be deployed by *nonmedical* personnel as a screening tool in venues, airports, stadiums, clinics, hospitals, festivals, concerts, offices, pharmacies, etc. From a simple saliva swab, users will know in under 30 seconds if a virus is present. “We believe that rapid, user-friendly testing is critical for early detection. It can mean the difference between life and death,” says Reem. And she knows of what she speaks.

Reem is a highly accomplished scientist with over 20 years in immunology and drug discovery. She’s a serial entrepreneur who, driven by the loss of her father to cancer, dedicated her career to developing methods for early detection of disease. As the former co-founder and SVP of Calico Biolabs, she led scientific operations to develop novel cancer biomarkers, resulting in extraordinary discoveries that are saving people’s lives. When COVID-19 hit, Reem turned her attention toward developing a pathogen-detection test with the aim to prevent the next pandemic. Launched in April 2023, RamanID’s test has already captured the attention of the medical community, labs, and private-sector industries eager to adopt it.

We had the privilege to meet with Reem and learn more about her career, how RamanID’s test works, and what’s on the horizon in her quest to push the boundaries of innovation to save lives.

## **Why did you choose to focus your career on the biotechnology field and drug discovery?**

The biotechnology industry offers exciting opportunities to develop new diagnostic tools, therapies, and treatments for a wide range of diseases and conditions, from cancer to genetic disorders. Drug discovery in particular is a challenging and rewarding field that requires a combination of scientific expertise, creativity, and persistence. The opportunity to develop an early detection test or new drugs that can improve the lives of patients is a powerful motivator.

## **How does RamanID’s pathogen-detection test work with regard to airborne viruses such as COVID or the flu?**

RamanID’s pathogen-detection test works by using a technology called Surface Enhanced Raman Spectroscopy to identify the unique molecular signature of a particular pathogen. It involves the use of a laser to illuminate a sample adsorbed on nanofabricated surface, such as a pathogen, and analyzes the scattered light using artificial intelligence/

machine learning to obtain information about its molecular structure. When the laser light interacts with the pathogen, it undergoes a phenomenon called Raman Scattering. This scattering process causes a small fraction of the light to shift in energy, which corresponds to the vibrational and rotational energy levels of the molecules present in the pathogen. This energy shift, known as the Raman Shift, is unique to each molecule and provides a characteristic “fingerprint” of the pathogen. By measuring the intensity and wavelength of the scattered light, a Raman Spectrometer can generate a Raman Spectrum, which represents the molecular composition of the pathogen. This spectrum can then be compared to a database of known spectra to identify the specific pathogen or determine its similarity to other pathogens.

Raman spectroscopy offers several advantages in pathogen detection. It is non-destructive, requires minimal sample preparation, and can provide rapid results. Additionally, it can be used for both qualitative identification and quantitative analysis of pathogens. With regard to airborne viruses, RamanID’s test would involve collecting biological samples and analyzing them for the presence of viral particles. AI and the Raman Spectroscopy technology would then be used to identify the specific viral particles present in the sample.

The RamanID system functions as follows: A biologic sample (e.g., saliva) is deposited on the sensor substrate of a cassette inserted into the Raman Reader. The 785nm laser, aimed at the sample on the substrate, generates the Raman Scatter Spectrum. This spectrum is then registered using a sensitive CCD and compared in the cloud against known descriptions of pathogens using a deep learning (AI) algorithm and reported. This secure cloud-centric approach allows all scanners worldwide to be rapidly updated remotely when new pathogen descriptions are available. As pathogen variants evolve, their spread can be monitored in near real time.

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

I find it rewarding to develop lifesaving tools, and to have a potential impact on society. I’ve always been driven by a combination of passion, creativity, and a desire to make a difference in the world.

**What other exciting innovative products are you working on?**

We’re constantly exploring new ideas and technologies to develop innovative products that can make a positive impact on people’s lives. Some areas we’re currently focusing on include UTI and



respiratory panels. Our innovative technology has been shown to be more sensitive than PCR, allowing for more accurate and earlier detection of UTI and respiratory infections. It’s easy to use, requires minimal sample preparation, and provides faster results compared to traditional diagnostic tests. Using our SERS platform for UTI and respiratory panels could provide significant advantages over traditional diagnostic tests. The increased accuracy and earlier detection could lead to better treatment outcomes and improved patient care. The ability to simultaneously detect more than one bacteria provides an added advantage to the RamanID. Additionally, the ease of use and faster results could make this technology a game-changer in the field of diagnostics. I’m sure many people will be eagerly awaiting the launch of this product. Our team is committed to pushing the boundaries of what is possible through collaborative science, and we’re eager to partner with clinics to develop products that will have a positive impact on the world.

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# MATT STRUSINSKI

OWNER & FOUNDER



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In the age of digital interconnectedness, the importance of cybersecurity cannot be overstated. Yet, many small businesses still regard it as a superfluous perk. Enter Matt Strusinski, the owner and founder of Oviedo Cybersecurity Consulting LLC, who knows that cybersecurity is not a dispensable option; it's a necessity.

Matt is not new to the realm of tech and cybersecurity. His journey commenced with the US Navy, where he served as an avionics technician from 2006 to 2011. Following an honorable discharge, he joined the Air National Guard in 2013, honing his skills in cyber operations. Matt's extensive experience, which encompasses supporting IT systems for the Department of Defense and defense contractor corporations, has made him well-acquainted with the most sophisticated and determined cyberthreats globally. Additionally, Matt's practical experience is supported by a B.Sc. in cybersecurity, magna cum laude, from American Public University and he is pursuing an M.Sc. in information security and assurance at Carnegie Mellon University, both programs boast accreditations from both NSA and DHS.

Spotting the critical gap in the market, Matt founded Oviedo Cybersecurity Consulting LLC in August 2022. Based in Central Florida, the company serves clients not just locally, but also extends its reach to Canada and other countries, and while they cater to organizations of all sizes, their primary focus is on making cybersecurity relatable and affordable for small businesses.

"Oviedo is a small business with the might of the largest, most powerful cybersecurity companies in the world. We have a direct line to the heaviest hitters in research and implementation in cybersecurity," remarks Matt. The company's partnerships with giants in the cybersecurity realm allow them to offer top-tier products and services, making them a trusted advisor to their growing clientele.

The digital era brings along vast opportunities, but with it come risks that businesses, regardless of size, cannot afford to ignore. As the world continues to experience an upsurge in cyberattacks, it's high time small businesses shift their perception and treat cybersecurity as the imperative it truly is. And with firms like Oviedo Cybersecurity Consulting LLC leading the charge, they're in capable hands.

We spoke with Matt to learn more about what makes Oviedo Cybersecurity Consulting LLC unique and how they are evolving ahead of cybercrime to protect small business owners.

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We go beyond merely providing platforms; we offer round-the-clock human monitoring.



#### **Why did you establish Oviedo Cybersecurity Consulting LLC?**

I believe every business, agency, organization, and individual has the right to operate in a secure environment—fully aware of, and equipped to handle, cybersecurity risks. Cybersecurity shouldn't be a privilege exclusive to large corporations. I founded the company to provide small businesses with affordable protection and to serve as their guide along their cybersecurity journey.

#### **What services does Oviedo offer?**

Business owners often realize the need for cybersecurity, but are unsure about specifics. I assist them in navigating this realm, understanding their needs, goals, and budgets. Oviedo offers comprehensive and affordable cybersecurity solutions coupled with personalized consulting. We go beyond merely providing platforms; we offer round-the-clock human monitoring. Unlike larger firms where assistance may be slow, I can directly reach service engineers for immediate solutions.

#### **How does Oviedo stand out in the cybersecurity landscape?**

While many firms offer an *all-or-nothing* package, Oviedo crafts a tailored roadmap for each client. We prioritize understanding over mere service provision. Many companies end up with complex systems that don't truly serve their needs because of the profit-centric approach of their cybersecurity providers. At Oviedo, we streamline, customize, and even help businesses tap into new revenue opportunities.

#### **Is cybercrime more prevalent than commonly perceived?**

Cybersecurity often conjures images of nefarious hackers. However, the reality is closer to the “smash-and-grab” style of theft that retailers experience. Cybercrimes often go unreported, creating a false sense of security among small businesses. These crimes, ranging from data breaches to financial theft, are subtle and can go undetected for months. The sophistication and frequency of cybercrimes are on the rise, and small businesses often lack the resources to identify and counter them.

#### **What's a common misconception about cybersecurity among small businesses?**

A recurring sentiment I encounter is, “We're too small to be targeted.” Just as businesses hire professionals for specific needs, cybersecurity demands expertise. Neglecting this can lead to disruptions, from paying fraudulent invoices to ransomware attacks holding companies hostage for vast sums. The importance of cybersecurity extends beyond mere protection; it's about ensuring seamless business operations.

#### **Lastly, Matt, what do you enjoy most about your work? What drives you?**

Curiosity drives me. I have an insatiable thirst for delving deeper into concepts. No two client requests are ever the same, which means I'm constantly exploring varied and evolving dimensions. What truly invigorates me is the challenge—approaching every task with full vigor, aiming for outstanding results. Ultimately, it's about exceeding client expectations and relishing the thrill of new challenges.





# FRANK MIALS SCURLOCK

## The Need to Play

In the world of entertainment visionaries, three names stand tall: PT Barnum, Walt Disney, and Ripley. Among them strides Frank Mials Scurlock, the chief visionary officer and founder of Scurlock Entertainment Global and the Noigiler Foundation Inc. Much like his distinguished predecessors, Frank has embarked on a mission to traverse the globe, seeking novel and creative ways to infuse happiness into the lives of all generations, fostering love and diminishing hatred along the way.

From the outset, Scurlock Entertainment Global has made its mark by addressing the universal need for play and merriment. Frank's brainchild specializes in curating experiences that transcend age, resonating with children, adults, and grandparents alike. Their underlying message is clear: a quest to sow the seeds of love while eradicating the roots of hate, a pursuit accomplished through the alchemy of happiness and fun.

Frank's life journey is one marked by resilience and an insatiable thirst for knowledge, cultivated through his worldly travels. Channeling the spirit of his illustrious forebears, namely Walt Disney, he aspires not just to establish amusement parks, but authentic thematic paradises. This aspiration was nurtured in his youth, when his parents – trailblazing risk-takers – introduced him to the intricacies of business. Even as a 12-year-old, Frank was handed business cards that boldly read "Future President," propelling him onto an entrepreneurial path.

The foundation for Frank's creative genius was laid within the inflatable industry – a legacy authored by his parents, who pioneered this burgeoning domain. Their first production facility took shape in 1976, with a teenage Frank navigating the rigors of high school alongside his growing professional responsibilities. A testament to his innovative lineage, Frank's father, John Scurlock, engineered the very first inflatable bounce house. This invention catalyzed Frank's understanding of a broader demand, motivating him

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Bolstered by a resolute mission, Scurlock Entertainment Global caters to an international audience, offering affordable, family-centric attractions and services spanning entertainment, rentals, sales, and more.

to spread the concept beyond New Orleans. With a location in Memphis inaugurated at just 18, Frank was now armed with his mother's coined phrase, "Here Comes Fun."

The mantle of creativity and ingenuity was seamlessly passed down, and Frank's initiation of Space Walk marked the dawn of a new entrepreneurial chapter. What began in a modest garage flourished into a nationwide network of 500 locations. Simultaneously, Inflatable Zoo was born under Frank's stewardship. In a transformative move, he sold these ventures in 2013, paving the way for his son Mials to shoulder their management – a responsibility he continues to uphold. Daughter Kelsey oversees marketing and recruitment, while son Tyler handles the shipping department. As his progeny carry the torch, Frank's unbridled creativity steers him toward fresh, uncharted endeavors.

Drawing inspiration from luminaries like Walt Disney, Steve Jobs, and Michael Jackson, Frank envisions himself as the amalgamation of their distinctive spirits. This concoction of creativity, innovation, and charisma fuels his continued journey. Scurlock Entertainment Group's recent focus on water-based attractions reinforces this ethos, with offerings like floating disco poles and innovative cabanas. Their consultancy services, sought by businesses aiming to inject playfulness into their models, underscore their versatile approach. As a private entity, they dictate their trajectory, grounded in the belief that love trumps monetary pursuits. Their product portfolio extends to resorts worldwide, where they imprint their signature blend of joy and exuberance. The roster spans terrestrial attractions like traditional bounce houses and aquatic endeavors encompassing floating obstacle courses and inflatables. A fabrication plant on the horizon is poised to birth these imaginative concepts in New Orleans.

Bolstered by a resolute mission, Scurlock Entertainment Global caters to an international audience, offering affordable, family-centric attractions and services spanning entertainment,

rentals, sales, and more. Their portfolio encapsulates diverse projects, from minority-focused educational fun centers to grand-scale master developments, enriching underserved locales.

Frank's narrative, however, takes an unexpected twist, with the seasoned visionary now pursuing the role of governor of Louisiana as a spiritual independent. This leap into politics germinated from a thwarted attempt to purchase an abandoned Six Flags Theme Park. In 2017, his mayoral campaign in New Orleans stemmed from his unfulfilled amusement park dreams. The tumultuous political landscape galvanized him to run for president in 2020 as an independent, a testament to his audacity. Now, as he aspires to govern, Frank leverages his unique gift for entertainment, stitching bonds that bridge divides. His mission remains steadfast: to mold happiness and unity through creativity, placing them above the pursuit of mere financial gain.

In the lineage of entertainment luminaries, Frank Mials Scurlock emerges as a torchbearer of joy. From the inception of pioneering inflatables to his current gubernatorial quest, his journey is a symphony of creativity, resilience, and love. As the world evolves, Frank stands as a testament to the enduring power of happiness, proving that, in a realm teeming with challenges, the pursuit of genuine, boundless joy remains an unwavering compass.

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In the dynamic world of finance, where markets ebb and flow like tides, one individual stands out as a true visionary and trailblazer—Ryan Derda. As the founder and managing partner of R. Beam Global Trading, Ryan has embarked on a journey to redefine the landscape of commodity brokerage.

With a career spanning 17 years in finance, Ryan's journey began in the aftermath of the 2008 market crash. While many were still reeling from the crisis, Ryan saw it as an opportunity to delve into the stock market, kickstarting a career that would eventually become his passion. He quickly grasped the nuances of financial markets, paving the way for his remarkable success. But Ryan is no 'one-trick pony.' His versatility in managing portfolios across different asset classes has been his secret sauce. He understands that success in finance means going with the trends, and his track record speaks for itself, as confirmed by the *Top Producer Award* he received from American Equity Insurance company.

"Every multimillionaire has multiple income streams—a principle I embraced from a young age," Ryan shares. This ethos allowed him to retire by the age of 40, but this was not the end of Ryan's journey. He reentered the financial services industry, delving into the uncharted waters of cryptocurrency, and pioneering a crypto hedge fund. Four years later, in 2023, Ryan founded R. Beam Global Trading. His journey had come full circle, bringing him to the helm of a commodity futures brokerage unlike any other. The genesis of R. Beam Global Trading was inspired by Ryan's in-depth knowledge of monetary history and its profound implications on portfolio allocation and management—a critical factor that sets his firm apart from traditional brokerages. While commodities are set to experience a 10-year super bull market, Ryan's keen insights position R. Beam Global Trading to capitalize on his foresight.

R. Beam Global Trading, headquartered in South Florida, is the embodiment of Ryan's vision. It adeptly manages portfolios encompassing the entirety of the commodities futures market, including but not limited to: Energies, S&P 500, cryptos assets, treasuries, and livestock, just to name a few. R. Beam Global Trading caters to a wide spectrum of investors, including hedge funds, brokerages, IRAs/401k holders, endowments, and individuals.

We spoke with Ryan to learn more about R. Beam Global Trading, his background, and why he chose to specialize in this niche of finance.

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**Ryan**  
**DERDA**  
FOUNDER/MANAGING PARTNER



## What inspired you to start R. Beam Global Trading?

Life, timing, years of experience managing clients' assets across multiple asset classes, and most importantly, a strategic partnership.

## How is it different from commodities futures brokerages?

Considering that all commodities brokerages must adhere to the same regulatory standards, this creates similarities from a structural standpoint. What makes us stand apart is the experience our team brings to the table, along with the incorporation of AI and algorithmic trading. Combined, our team offers 40 years of trading, investing, and portfolio management skills.

## Tell us a bit about your background. Were you always fascinated with finance and economics?

Finance and economics became my obsession after losing a quarter of a million dollars in the '08 Global Financial Crisis. Up until that time, I knew how to make money, but I was by no means an expert in what to do with it. I was successful in business, and I got lucky flipping a few houses leading up to the crash, but after suffering that loss, I made it my life's mission to learn everything I could about real estate, capital markets, and economics. My obsession drove me to ultimately earn my Series 7 (since surrendered), 214 License (life insurance and variable annuities), and most recently, my Series 3. My management experience includes portfolios in stocks, bonds, mutual funds, life insurance strategies, real estate, crypto, private placements, and precious metals.

## You view gold, silver, cryptocurrency, and commodities as the most valuable portfolio assets. Why?

The world is amidst a global monetary system reset and power shift. For this reason alone, I am very bullish on gold, silver, bitcoin, and commodities. We are seeing rapid de-dollarization and high global inflation, if not hyper-inflation. These types of events do not bode well for stocks and bonds, but on the contrary, are major catalysts for global commodities.

## Where do you believe the financial system is headed in the future?

Fiat currencies have an average lifespan of 40 years—the US dollar is now 52 years old. The average lifespan for a global reserve currency is 95 years—the US dollar is in year 102 of this cycle. There is no doubt that we are moving toward a blockchain-based monetary system. Gold and silver have been currency for 5000+ years, and we are now seeing global central banks buying gold at a record rate. I'm no FBI agent, but I'd say, that's a clue.



**"I thoroughly enjoy the ever-evolving climate of global finance and economics. This is a profession that prevents me from getting complacent."**

It is also rumored that BRICS (the world economies of Brazil, Russia, India, China, and South Africa) are backing their "new global reserve currency" with a basket of commodities. So, if commodities are going to backstop the global blockchain-based financial system, then I see that being the proverbial "writing on the wall" as to where to park your investable capital.

## What do you enjoy most about your work?

I thoroughly enjoy the ever-evolving climate of global finance and economics. This is a profession that prevents me from getting complacent. To do what my clients hire me to do, produce a potential ROI, I must always stay on top of my game. I must always be growing and evolving, not only in my profession, but personally as well. My biggest driver is the value I believe I can bring to the lives of those around me and my team of experts.





# STEPHEN GABOUREL

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CHIEF EXECUTIVE OFFICER  
**SG INSIGHTS, LLC**

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In the realm of organizational transformation, Stephen Gabourel stands as an influential figure. Renowned as the founder and CEO of SG Insights, LLC (SGi), he's a fusion of sociologist and data scientist, wielding a unique proficiency in both quantitative analytics and qualitative understanding.

With over a decade immersed in organizational data, Stephen translates research into actionable insights that kindle tangible change. Having delved into the inner workings of over a hundred entities, he grasps their shared aspirations and hurdles and, armed with solutions, he orchestrates alignment with missions, fostering prosperity. Stephen's legacy encompasses 250+ strategic assessments, shaping a trajectory of evolution for diverse organizations and destinations. His expertise transcends data – it's a catalyst for metamorphosis, making him a quintessential partner for enterprises striving to actualize their societal and altruistic endeavors.

Stephen's objective is most eloquently articulated in his own words: "There are a lot of wonderful things in the world that we need more of and a lot of challenges we need to work through. I see research as a bridge to revealing areas of consensus and benefiting the world. Things like creating jobs and social services, providing education, closing the achievement gap in Black and Brown communities, affordable housing, and access to health care—all of this is informed by data and if we can really understand the populations that need it the most, where they are, how their situations became that way, then maybe we could design a better way to address that and tell that story."

We spoke with Stephen to learn more about SG Insights and how they are creating a better future for companies, large and small organizations, communities, and the people who live in them.

## **What inspired you to start the company?**

I love applying the scientific method to day-to-day life and business. I have an investigative spirit. Studying sociology in graduate school and applying those skills during my career as a market research consultant has naturally ushered me to this position. Every day we face challenges. And there is sometimes painful uncertainty that goes along with that. For businesses, public service organizations, or even product or application developers, everyone is concerned with how on earth do we make sure what we are putting out there is valuable and relevant, and worth the time and resources. At the end of the day, that's what it's mainly about in this society. Ultimately,



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how do we do more of our mission and make the greatest possible gains or impacts? I want to use human-centered research methodology to improve service delivery as it may be relevant to all these entities. Strategic planning can be an unruly endeavor, but it doesn't have to be. I want to make that process as simple and reasonable as possible, to bring many stakeholders and community members along for the mission, without sacrificing validity and comprehensiveness of effort. Businesses can and should be better connected, in conversation with each other, and informed by their end users.

#### **What makes your approach unique?**

Not only do I bring an understanding of your business, I take into consideration the people that make your enterprise possible. Storytelling is an art and science. My research involves level setting your performance and systematically incorporating feedback from your staff, users, or customers to form a set of strategic priorities. As a sociologist, I have fine-tuned my listening and analytical skills for spotting key differences between groups. My concerns are not centrally financially based, but my task is to genuinely create an informed snapshot of things you are doing well and areas you can improve, whether that's fostering deeper member engagement, improving marketing messages, data governance, program delivery and beyond. If the conversations are being had in

your constituency, the major themes will be surfaced through research and incorporated into your planning.

#### **What do you enjoy most about your work, or what drives you?**

Creating those moments of gold. No matter what, when I go into these types of evaluations, while there are a lot of affirmations of things these program managers, directors, VP's, and CEOs have already been sensing, there is often that one nugget of knowledge surfaced from the research that creates a stir and staff and leaders get excited about. And that's what excites me; being a part of positive, sustainable change, being a conduit of fresh ideas and new thinking that benefits people, life, and work processes. From a simple conversation or unique way of positioning springs a fountain of rich ideas and possibilities. Sometimes it takes an outside perspective to breathe refreshed energy into a vessel, make unseen connections, and catalyze new actions. As leaders, I feel it is our responsibility, if not our obligation, to use our voices and our power to ensure that the conversation and the initiatives that we're spending our time, energy, and resources on actually benefit people, communities, and the greater good for all.

Stephen holds a master's degree in sociology from Loyola University in Chicago.



*Talking Insurance with*

# JASON M. KREIDER

CFEd®, RFC®, NCCM

OWNER, MANAGING MEMBER



Growing up, Jason Kreider idolized his father, a businessman with a successful career in insurance-based financial planning. His mother, a classically trained musician, and his father divorced very early in Jason's life. Remarrying, both his mother and his stepfather helped raise him into the man he is today. During Jason's limited time together with this father on the weekends, he learned a lot about insurance through listening to important discussions at his father's clients' kitchen tables.

Although a serious accident put a damper on his college years, Jason persevered. He began working part-time in his father's agency, M.K. Financial Management, Inc., but decided it was best to learn from a competitor. He went to work as a temp for the largest insurance brokerage general agency in the country at the time and steadily climbed the corporate ladder. Two decades later, he continues to work with the same relationships that helped to jumpstart his career. "We've worked together on many large cases, one recently a \$135 million case—the largest they've ever had," he says.

In 2015, Jason's father passed away, and he became the executor of his father's estate and officer of his business. He saw this not as a rite of passage, but as rising to the occasion to help his loved ones while honoring his father's legacy. "I realized the importance of what happens to families after a traumatic event," he says. To continue the path his father started, Jason established Kreider Financial Management, LLC, in October 2015 and two years later, acquired his father's life and fixed annuity books of business. He later added KinG Brokerage, where he focuses on the brokerage side.

We had the opportunity to talk with Jason and discuss the lasting impact his father's life and death have had on him, how he has returned to his brokerage roots, and why he jokingly views himself as the "Bob Ross of insurance."

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**I treat each client like family; it is my golden rule, and I do not compromise on my morals or faith. I don't have anything without a customer's trust.**

## How has your father influenced you?

My father knew how to serve his clients well and many remember him as a charismatic and personable man. Behind the scenes though, his abrupt illness caught him unprepared. After his passing, we had to turn the mess into something good. I am no better or different from anyone who faced hardships, but overcoming those obstacles and building a niche for myself has been a blessing. I learned a lot from my father about running a business and how to talk to clients, whether about everyday things or significant events. I strive daily to maintain the same high standards he set, so I treat each client like family; it is my golden rule, and I do not compromise on my morals or faith. I don't have anything without a customer's trust.

## Tell us a bit more about KinG Brokerage. What makes it unique?

We are a boutique insurance brokerage general agency and typically compete against large companies, serving the public and other financial professionals nationwide. We specialize in impaired risk underwriting, complex case design, and retirement planning. We take great pride in being strong and deep enough to provide advisors with top pay and all the concepts they need to serve their clients. Myself and my team, which includes my wife, create brokerage development platforms and have built a niche by serving advisors in a secondary or tertiary capacity. For example, if you have an advisor who sells auto and home insurance but doesn't know much about business succession, he will hire us. We don't advertise much because we work in a capacity behind the scenes. As they grow, many agents allow my company to create a brand for themselves by referring business.

## Your sister, who is autistic, has also had an enormous impact on your life.

My passion for this business was ignited by growing up with her. I saw how the world handled people like her. It was a humility that overwhelmed me, and she was always my



**Selling insurance can be monotonous, so I view every case as an art form.**

source of accountability. Because of my sister, we have ties to building playgrounds in local communities and I am proud to be an advocate for a playground designed in my hometown earlier this year.

## Why are you called the Bob Ross of insurance?

Selling insurance can be monotonous, so I view every case as an art form. It is a transactional-based business, but I see it from a relationship-based perspective. My chief role is the guy with the vision and I'm fortunate to work with a talented group of people that help run the business.



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The career landscape is an ever-evolving tapestry, marked by the ambitions and dreams of its navigators. Few understand this dynamic world as intimately as Ioanna Mantzouridou Onasi, co-founder and CEO of Dextego, Inc.

Born amid the sun-soaked beauty of Greece, Ioanna's aspirations were never limited by geographical boundaries. From a tender age, she was captivated by the allure of the global business realm. By 15, she was on American shores, embracing a rigorous educational journey at St. Lawrence University, a liberal arts college. While summer stints sharpened her grasp of sustainability and the human psyche, it was an internship at Marc Jacobs in the Big Apple that revealed the untenable facets of fashion, pushing Ioanna to champion sustainable alternatives and stand up for Greek women affected by economic turmoil by creating DGRwear, with 100% handmade clothes and accessories.

Notably, it was at Pace University, during her master's program in strategic management, that Ioanna unearthed her true calling—the intricate realm of talent development. Embracing her newfound passion, she ventured into organizational design and human resources, leaving a mark as the VP of People and Chief of Staff at Aptivio. Here, she meticulously wove the Aptivio ecosystem, further establishing her reputation as a talent development strategist.

Amid the forthcoming accolades, including the coveted *Young Leader Award* at the Education 2.0 Conference, and her co-authored book, *Ed. Metadores*, Ioanna nurtured an ambition to reinvent how talent development was approached, especially for the Gen Z demographic. Enter Dextego, Inc. Established in 2023, Dextego stands at the forefront of blending advanced AI with soft skills training. At its core lie the Dexters, individuals embarking on an unparalleled journey of self-growth. The platform uniquely curates challenges to reflect real-world experiences, ensuring genuine enhancement. Through video recordings, the AI coach deciphers nuances from tone to body language, creating an unprecedented, tailored learning experience. Within a mere four months of its inception, Dextego's novel approach has already attracted a user base of 700, emphasizing its rapid trajectory of success.

Behind Dextego's rise is Ioanna's unyielding commitment to her vision. Her narrative emphasizes the convergence of diverse experiences — from sustainable fashion advocate to AI evangelist, to talent development strategist. She stands as a beacon for Gen Z, underscoring the significance of soft skills and holistic development.

*Ioanna*  
**MANTZOURIDOU ONASI**  
CO-FOUNDER & CEO



As the world stands at the cusp of workplace evolution, figures like Ioanna Mantzouridou Onasi ensure that the transition is not just smooth, but also inclusive. Dextego, under her stewardship, promises a future where talent thrives, and individuals realize their utmost potential. Through her endeavors, Ioanna is not just shaping careers; she's sculpting the very future of global talent development.

We spoke with Ioanna to learn more about Dextego, who benefits by using it, and how it came to be.

### **Ioanna, who was Dextego designed for, and how do users benefit from it?**

Dextego primarily serves B2B markets, catering to high-growth and enterprise companies looking to nurture and retain their top talent. Consider this: a top performer is up to eight times more productive than an average employee. Losing such talent can delay a company's growth and revenue targets significantly. Our platform offers a coachability score to guide companies on talent decisions. Furthermore, Dextego balances AI with human interactions creating a learning community, enabling both individuals and businesses to thrive. In this era where AI is reshaping industries, Dextego stands out by harnessing this technology to enhance human potential.

*"Our mission transcends mere skill enhancement; it's about inclusivity, equity, and creating equal opportunities."*

### **What sparked the idea for Dextego?**

My tenure at Aptivio, a B2B SaaS startup, was an eye-opener, revealing the nuances of managing a startup. A glaring challenge emerged: the need for refined soft skills among young professionals, especially in a remote, post-COVID environment. Current tools lacked the personal touch and engagement essential for Gen Z. This prompted me to conceptualize a platform tailored to individual needs, making learning immersive and impactful. Supported by my Aptivio CEO and my co-founder, Sean Vazquez, I embarked on the Dextego journey. Our mission transcends mere skill enhancement; it's about inclusivity, equity, and creating equal opportunities. As a Gen Z, immigrant female founder, I've infused Dextego with insights from my own experiences, which has resonated with our target demographic. The response has been overwhelming, and this is merely the prologue. The path ahead promises challenges, and I'm geared up to navigate them, propelled by my faith in Dextego's transformative potential.



### **What are your most notable professional achievements?**

The success of a company largely hinges on its team. My crowning accomplishment was recruiting exceptional talent during my tenure at Aptivio, which paved the way to Series A funding and achieving our revenue milestones.

### **What aspects of your work bring you the most joy?**

Throughout my life, individuals have naturally gravitated towards me, seeking guidance on honing soft skills, whether it's building confidence or mastering public speaking. Assisting people globally in cultivating these essential skills, regardless of their chosen profession, feels like making a tangible impact on the world. This aligns perfectly with my childhood vision—not of a particular profession, but of creating significant change. Every day, I'm fulfilling that vision, making a difference in countless lives.





# MELVIN HENLEY

PRESIDENT



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Make an #imPACt,  
not just noise.

**M**ore than 20 years ago, Melvin Henley embarked on a career as a carpenter in Chicago. Today, he is the president of PAC Leaders, a commercial general contractor/construction management firm. The company is also signatory to multiple Chicago unions.

Recently, Melvin announced PAC Leaders' associate partnership with the Chicago Fire Football Club, the city's Major League Soccer team. "We are developing the first construction management apprenticeship program to knowledge and have teamed up with City Colleges of Chicago and Chicago Public Schools," Melvin says. "When we told Chicago Fire about what we're doing, they loved it, as we have a shared commitment to the youth of Chicago".

Melvin's passion for positively impacting the community is also evident in another project that PAC Leaders are involved in. Two years ago, the original project was featured in *Architectural Digest* and other newsworthy articles for the *Chicago Architecture Biennial 2021 Edition: The Available City*, for creating artistic structures in vacant city lots. PAC Leaders provided the entire construction back office and onsite execution, but unfortunately were not given credit in any news media. From this endeavor, the company formed an alliance with Grow Greater Englewood, where they continue to work on similar projects, including turning a decommissioned school into a community center and revamping a city plaza that will outlet for the Englewood Nature Trail.

They also formed an alliance with the Sweet Water Foundation. This has yielded many rewards as they have worked in tandem in a few cities, and are currently featured in Venice, Italy, for La Biennale Di Venezia. The wooden structure built on the south side of Chicago was disassembled, organized in a shipping container, and delivered to Forté Maghéra. "The Biennale will feature our exhibit and many others, from May 20th through November 26th," Melvin adds.

We had the pleasure of speaking with Melvin to learn more about his company, his unwavering commitment to his community, and his personal motto.

**Q: Tell us about the construction management program you are developing:**

We are serious about giving back and just hired 10 youth apprentices in a pilot program we co-developed with City Colleges of Chicago for construction management, which we are applying to become a registered apprenticeship. Having an employer work hand-in-hand with the college, while providing on-the-job training through an apprenticeship program, strictly for construction management, has not been seen anywhere else in the country. Unions don't know how to quantify what this apprenticeship looks like, and therefore run opposition. And in *Right to Work States*, this would also be of minimum concern. So, our saving grace was actually identifying the program, the work process schedule, the actual work and curriculum, the offices that can be held, and the hours required for each one. I've worked on this personally, with the director of the program for city colleges.

**Q: Can you tell us a little bit about your background?**

I started as an apprentice, observing everyone I worked with. I learned from people who knew more than me. For example, I worked for Kiewit for nine years and learned a lot about safety, quality and good communication. When I became superintendent for another company, I learned how to manage schedules, workers, expectations, and I eventually took all of this knowledge and started my own company.

**Q: What sets PAC Leaders apart from others in the industry?**

Our culture makes us different—we're a small, BIG company, if that makes sense. I learned from working for large companies where they have a culture that you don't mind getting up and going to work, every day. Our culture is that every person is valued. I have a vested interest in ensuring deserving ones advance to another level. For example, our VP of operations started as an office manager. The company encouraged and adjusted for her continuing education and today, she oversees many departments. So, outside of good business and quality work, the culture we have and the support we offer for growth potential is from various cultures culminating throughout my career. What drives me is seeing people feel they're appreciated, learning something, and adding value.

**Q: Do you have a motto or philosophy that you live by?**

We recently trademarked my motto: "Make an #imPACt, not just noise." Also, people often ask what PAC stands for—it stands for Project and Construction. Therefore, our tagline is "We are YOUR Project and Construction leaders."





# DEAN L. FANELLI

Co-Founder and Managing Partner | Ph.D., J.D.

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As advancements in biotechnology and drug development evolve at breakneck speed and an explosion of startups push the boundaries of medical innovation to develop life-altering therapies, they carry with them the promise of hope for millions of people suffering from cancer or rare, debilitating diseases. Dean Fanelli has been at the forefront of this evolution for over 20 years, servicing the biotech and pharma industries as both a patent attorney with a Ph.D. in organic chemistry and an investor with decades of experience in identifying patents and early-stage technologies, and advancing them from inception to commercialization. By 2019, he'd helped hundreds of clients as an attorney, currently working with Cooley LLP in Washington, D.C., and long gained a reputation for his unique capabilities in assisting emerging-growth companies, and for his own success as an investor.

However, Dean wanted to do more to help spur their progress to bring new treatments to the incalculable number of patients whose lives hang in the balance. Driven by this mission, he co-founded Linden Lake Venture Capital, where he and his team found, build, and invest in the next generation of biotechnology companies bringing transformative new molecular medicines to patients in need. With a hands-on approach and a focus on early-stage technologies, this group of passionate, learned minds leverages a unique skill set that combines technology and medical expertise, legal acumen, and private equity investment experience—and a long, consistent track record of entrepreneurial success. Linden Lake's portfolio of investments includes, among others, Vesigen Therapeutics, Xsphaera Biosciences, C-Reveal Therapeutics, and AexeRNA Therapeutics.

"It is an honor to work with these early-stage, emerging-growth companies, and assist them in advancing their assets toward commercialization, and delivering them into the hands of those desperately waiting for them," Dean says.

It was *Top 100 Magazine's* privilege to talk with Dean about how he combines two complex spheres of knowledge to not only help promising ventures succeed, but advance medical science for all.

## What compelled you to start Linden Lake VC?

As an IP attorney over the past two decades, I've had the incredible opportunity to see many groundbreaking technologies in their very early stages. I wanted to challenge myself to do more—to be the one to identify the science, particularly at tier one research universities, and utilize my skill set as a patent attorney to create value and ultimately to advance life-changing technologies to patients. This is exactly what we have been achieving at Linden Lake VC.

**How does your experience as a patent attorney focused specifically in this area play a role in identifying promising new biotech and pharma assets? Some might say this is the role of a medical professional.**

As a patent attorney, I saw the role patents play in creating value and inflection points for early-stage biotech companies. Whether it's obtaining a broad patent to a company's platform technology or drafting focused claims after analyzing data from pre-clinical and clinical trials, patents play a critical role in protecting the science and creating value for a company.

**You're also an entrepreneur and the co-founder of multiple biotech ventures, one of which was acquired by a larger company. How does this insight benefit the emerging companies you invest in and work with?**

We founded three start-up biotech companies and are co-investors in two others. Our first startup, PhosImmune, which identified tumor-specific phosphopeptide tumor targets found on a wide variety of cancer types, was acquired by Agenus, Inc., and the technology is currently being advanced. We gained an incredible amount of insight building PhosImmune, particularly how difficult it is to identify and advance technology. It takes a tremendous amount of effort, but if you work hard and believe in science, it is absolutely worth the effort.

**What's one piece of advice would you give to emerging biotech companies?**

As an emerging biotech company, there are tremendous headwinds, particularly as a company grows, adds personnel, and raises outside financing. Many people will offer perspectives that may cause you to question your judgment in the underlying technology. Remember to believe in science and the potential of that science to change people's lives. In every successful company I have ever worked with, it is the belief in the science and its potential from the founding team that inspires me and always impresses me.

**What do you enjoy most about your work? What drives you, Dean?**

Seeing technology that I personally identified at a very early stage enter clinical trials with the potential to change people's lives is without question the most rewarding part. You never know how a drug will affect the human body until you conduct clinical trials, but being part of the team that combines technology area expertise, legal acumen, and private equity investment experience is incredibly challenging and at the same time incredibly rewarding.



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# SIDNEY SOGBOR

FOUNDER/CEO



Sidney Sogbor, the founder and CEO of Seadmok Water Construction LLC, stands as a testament to unwavering dedication and relentless determination in the water industry. Leading the company from its inception, Sidney focuses on driving profitability, shaping company structure, and devising strategic plans.

Sidney's journey in the water industry began at the age of 19, when he took up the role of a water operator in utility maintenance. This physically demanding role not only provided him with deep insight into the field, but also nurtured his thirst for knowledge and growth. While his expertise largely remained rooted in the water industry, Sidney expanded his understanding of business operations through self-education and research. Presently, he's advancing his business acumen by pursuing a degree in business and entrepreneurship. Beyond his educational pursuits, Sidney holds various industry certifications in areas such as safety, development, and maintenance.

Sidney's story is one of resilience. After immigrating from Ghana, West Africa, at a young age, he chose not to let challenges deter him. Instead, he transformed them into opportunities, culminating in the establishment of Seadmok Water Construction LLC in 2017. The company's name pays tribute to his loved ones, being a combination of the initials of his wife, parents, and siblings. Located in Howard County, MD, Seadmok specializes in maintaining, repairing, and replacing various water and sewer assets, including fire hydrants, water mains, and house connections, to name a few. With a team of 12 dedicated employees and two contractors, Seadmok prides itself on addressing challenges that even larger companies shy away from. They execute projects efficiently, maintaining quality, integrity, and workmanship as their core values.

In its tenure, Seadmok has completed over 100 projects for both government and commercial entities. These projects vary in scale, with some reaching hundreds of thousands of dollars. A significant achievement includes a contract awarded by Anne Arundel County for a large meter replacement project. Previously working as a subcontractor for the County, Seadmok's elevation to a prime contractor underscores their growing reputation.

One of their most notable projects involves collaboration with the Thurgood Marshall School, PS103, currently under renovation by Beloved Community Services CDC. Built in 1877, this historic school is poised to house The Judge Alexander Williams, Jr. Center for Education, Justice, and Ethics, alongside office space for the National Park Service. The estimated development costs stand at \$14 million. Seadmok's contribution to this illustrious project includes providing various water and sewer connections, as well as specialized concrete work.

In summary, Sidney Sogbor's Seadmok Water Construction LLC exemplifies commitment and expertise in the water industry. With each project, they not only enhance their professional stature but also contribute significantly to community development.

We spoke with Sidney to learn more about his background, inspiration, and motivation.

**Q: You've spent your entire career in the water industry. Tell us a little bit about your background.**

I began my journey in the water industry at Wachs, where I gained extensive knowledge about the functionality of water valves and mains. After spending several years there, I transitioned to WSSC, a municipality that exposed me to a wide range of learning opportunities, from water and sewer construction to contractors' billing practices. It was during this phase that I founded Seadmok. Later, I joined another municipality, DC Water. It was here that everything came together for me, leading me to pursue contracts more aggressively.

**Q: What inspired you to start your own company?**

My inspiration traces back to my childhood. My parents ran an export company, and I often assisted them, even with tasks as simple as putting labels on bottles. I've always had a passion for hard work and the sense of accomplishment it brings.

**Q: You're known for finding solutions for difficult projects where other companies have given up or failed. Could you share one or two of these stories with us?**

Certainly. On one occasion, a client needed a fire line installed for her new restaurant. Located in Ellicott City, an area notorious for its rocky terrain, most contractors raised their bids due to the anticipated challenges. Despite receiving higher quotes of \$77K and \$64k, the client chose Seadmok's competitive bid of \$54k. We successfully completed the challenging project in a mere 27 hours, and the café subsequently opened its doors to the public.

**Q: What do you enjoy most about your work, or what drives you?**

The transformational process of each project is truly rewarding. Taking an empty space and turning it into something functional and valuable is what I love most. Beyond that, witnessing the sheer joy and satisfaction on our clients' faces post-completion fuels my passion for the job.

**Q: Do you have a favorite quote or personal motto that inspires you, in your life or in your work?**

Absolutely. I've always believed, "The sky is never the limit, there's something above that so keep going."



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LI: Sidney Sogbor



# DOROTHEE RAINIS

## FOUNDER & CEO

Two years ago, Dorothee Rainis was marking 15 years as a long-established leader with positions in portfolio management at multibillion-dollar funds in Switzerland. Over her extraordinary career, she had leveraged her skill and expertise as part of a portfolio management team that grew a \$2B independent fund to more than \$8B—becoming one of the biggest in the Zurich area. In 2021, as associate director in the fixed-income portfolio management team at Brandywine Global Investment Management, she was overseeing well over \$50B in institutional assets.

While many successful professionals of her stature might stay the course on this lucrative path, Dorothee left it all behind to start a company with the sole mission to help smaller hedge funds, family offices, and individual investors thrive—Aurelio LLC. In a sterling testament to Dorothee's passion, ingenuity, and expertise, the firm's first client was none other than her previous employer, Brandywine Global Investment Management.

**Aurelio: A game-changer for independent hedge funds, family offices, and institutional investors.**

Based in Princeton, NJ, Aurelio provides top business advisory services to smaller hedge funds, family offices, high-net-worth individuals, independent professional investors, and women-run businesses with a focus on the investment process.

Providing insight often only available to large corporations, Aurelio offers support in developing a process to uncover innovative investment opportunities. They streamline current methods while integrating improvements deduced via compliant research, identification of emerging trends, and advanced quantitative modeling, all while cultivating long-lasting relationships based on open communication, especially crucial in an ever-changing economic environment in which staying up to date can be particularly challenging.

Dorothee and her team seek not to reinvent, but to provide solutions that comprise the creation of bespoke financial and valuation models, the optimization of their clients' existing models, support in quantitative analysis, the implementation of new approaches in machine learning, as well as effective communication of research and investment results to clients. And they do it all on an ad-hoc basis without the expense of creating new internal positions. By providing a la carte services, which also include developing pitch books and other marketing materials, alpha-producing ESG models, and macro dashboards complete with scenarios and forecasting models to interpret data, clients get exactly what they need, and nothing they don't. This approach allows smaller firms to compete, all while supporting and elevating clients' own unique ideas.

We had the pleasure to meet with Dorothee, who shared more about the inspiration behind Aurelio and how they're leveling the playing field and changing the way small firms are investing.

### **What inspired you to start Aurelio?**

I saw so many smaller hedge funds and family offices struggling to produce in-house. Big firms have access to many models and approaches, but smaller firms simply don't have the budgets. I started Aurelio to help them. To my knowledge, there are very, very few consulting firms offering this level of service on an ad hoc basis. We help them optimize their investment process without needing to find a full-time employee, and provide a suite of tailored solutions to help them thrive.

### **Aurelio has quickly become known for its unique model, and broad array of services and expertise. Can you tell us a bit more about some of your particular specialties?**

We don't provide investment recommendations. We work alongside investment professionals to hone in on the essentials. We're at the forefront of bridging quantitative financial analyses, so our solutions are quantitatively sound but still intuitive. And we're not a single niche; we know a whole suite of approaches, so we can work with, and understand, different clients and help them accomplish their goals and improve what they already have in place. My background comes from discretionary macro, so I *have* to understand why and how things move, from the minute to the broad. Given that I've run through all stages, from development to strategy to implementation to explaining it, I know what's important to every stakeholder, and how to present everything. It's never a black box.

### **Quant and AI models are becoming increasingly popular. How do you help smaller firms incorporate these into their more traditional offerings?**

Being able to incorporate these tools and models and offer them to their clients is becoming increasingly critical for smaller firms to compete and thrive. Equally critical is their ability to clearly communicate the complexities and values of these new approaches. But many firms still don't know how to break into these new areas. And if they've never worked with quantitative models, it's very tough to sell them to their clients or even be convinced they work. So we craft models that expand their intuitive understanding of markets while showing how quantitative models generate more money, and help them communicate it to their clients. Our a la carte services also allow them to tackle projects they've shelved for budget reasons.

### **What do you enjoy most about your work?**

I love the analytical part because you continue to learn something new. It satisfies my curiosity. But the beauty of financial markets is you have immediate feedback, so you know if you're right. And, personally, it's so great to see positive feedback for our clients, especially women-run funds.



**AURELIO**  
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Brian Briscoe conducting a unit inspection at the Eleanor Rigby Apartments. This unit was recently vacated and is currently for lease. It is in amazing condition as you can see by the photos. The kitchen has solid-surface counters and stainless steel appliances, including dishwasher, fridge, microwave, oven, and stove.

# BRIAN BRISCOE

FOUNDER/CEO/HOST



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Brian Briscoe, the founder and CEO of Streamline Capital Group, is a visionary leader who has carved a remarkable path in the world of multifamily real estate investing. With a commitment to long-term growth and cash flow for his investors, Brian has been a driving force behind the success of Streamline Capital Group, headquartered in Salt Lake City, Utah.

A seasoned fund manager and investor, Brian's journey in real estate began when he co-founded his first real estate investment firm, a company that quickly gained recognition in the Southeastern U.S. Here, Brian played a pivotal role as the lead sponsor, asset manager, capital raiser, and key principal on these properties, showcasing his exceptional skills and dedication. After retiring from the U.S. Marines, Brian then set his sights on replicating his success and founded Streamline Capital Group. As a multifamily operator and investor, Brian has owned nearly 1400 units, valued at over \$140 million.

Streamline Capital Group has thrived under Brian's visionary leadership. The company specializes in buying and managing apartments, delivering high-risk adjusted returns to its investors. Focusing primarily on the Greater Salt Lake City metro area, Streamline Capital Group distinguishes itself by adopting a long-term investment approach. While most companies in the apartment investing industry opt for shorter investment timeframes, typically 3-5 years, Streamline Capital Group takes a different route. Brian's team holds onto properties for an extended duration, enabling investors to build substantial wealth through a continuous stream of income. The Group's unique strategy involves the acquisition of value-add properties, followed by strategic refinancing to swiftly return investors' capital, and then holding the investment long-term for passive income and equity growth. This approach, combined with Brian's unwavering dedication to his investors' financial success, has made Streamline Capital Group a trusted name in the real estate investment industry.

In addition to his role at Streamline Capital Group, Brian is the host of the *Diary of an Apartment Investor* podcast. This program has become a valuable resource for individuals seeking insights into the world of apartment investing, as Brian shares his wealth of knowledge and experiences with a global audience. Beyond the podcast, Brian's commitment to education and mentorship led him to establish the Tribe of Titans, a multifamily educational community. This platform offers a unique blend of subscription-based content access and individual coaching,

providing aspiring investors with the tools and knowledge needed to build their own successful apartment investing business. With Brian's guidance, over 300 Tribe of Titans members have embarked on their journey to financial freedom.

We spoke with Brian to learn more about his motivation to start Streamline Capital Group and why, through Tribe of Titans and his wildly popular podcast, he freely shares his experience to assist others in pursuing a career in real estate investment.

### **Brian, what inspired you to start Streamline Capital?**

In 2019, while still serving in the Marine Corps, I found myself looking for a way to scale my real estate investments beyond single-family homes in order to build wealth and generate passive income. During that time, I co-founded an apartment investing company that acquired 629 units with a combined purchase price close to \$40 million. Simultaneously, I assisted others in investing over \$10 million into these ventures, yielding an average annualized ROI of around 20% for our investors. When I retired from the Marine Corps and returned to my hometown of Salt Lake City, I decided to establish Streamline Capital. I wanted to leverage my experience and the success of my previous company while also pursuing my passion for my hometown.

### **Can you tell us more about The Tribe of Titans? It was designed to help novice and experienced real estate investors achieve their goals, is that right?**

Absolutely. The Tribe of Titans is a platform tailored to support both novice and experienced real estate investors in reaching their objectives. It offers an affordable subscription model along with individual coaching. When I started Tribe of Titans, I took a different approach from similar platforms that charged significantly higher rates. My goal was to make it accessible to everyone. Currently, our subscriptions are just \$60 per month, and the feedback from our members, who had previously paid for pricier subscriptions, has been overwhelmingly positive. In addition to our subscription model, we introduced individual coaching last March, which comes in an annual package. Furthermore, we plan to expand our offerings in the next six to eight months, introducing a lower-priced group coaching option for sessions of 15 people and a premier content tier that includes everything our coaching clients have access to, minus the meetings.

### **Tell us about your podcast, *The Diary of an Apartment Investor*.**

The *Diary of an Apartment Investor* is a unique podcast that serves as an extension of Tribe of Titans. Unlike most podcasts that feature interviews with single investors, our show brings two individuals onto each episode—a seasoned investor and someone aspiring to enter the field. We begin by interviewing the experienced investor, followed by a live Q&A session where the aspiring investor gets to ask anything they desire. It's essentially



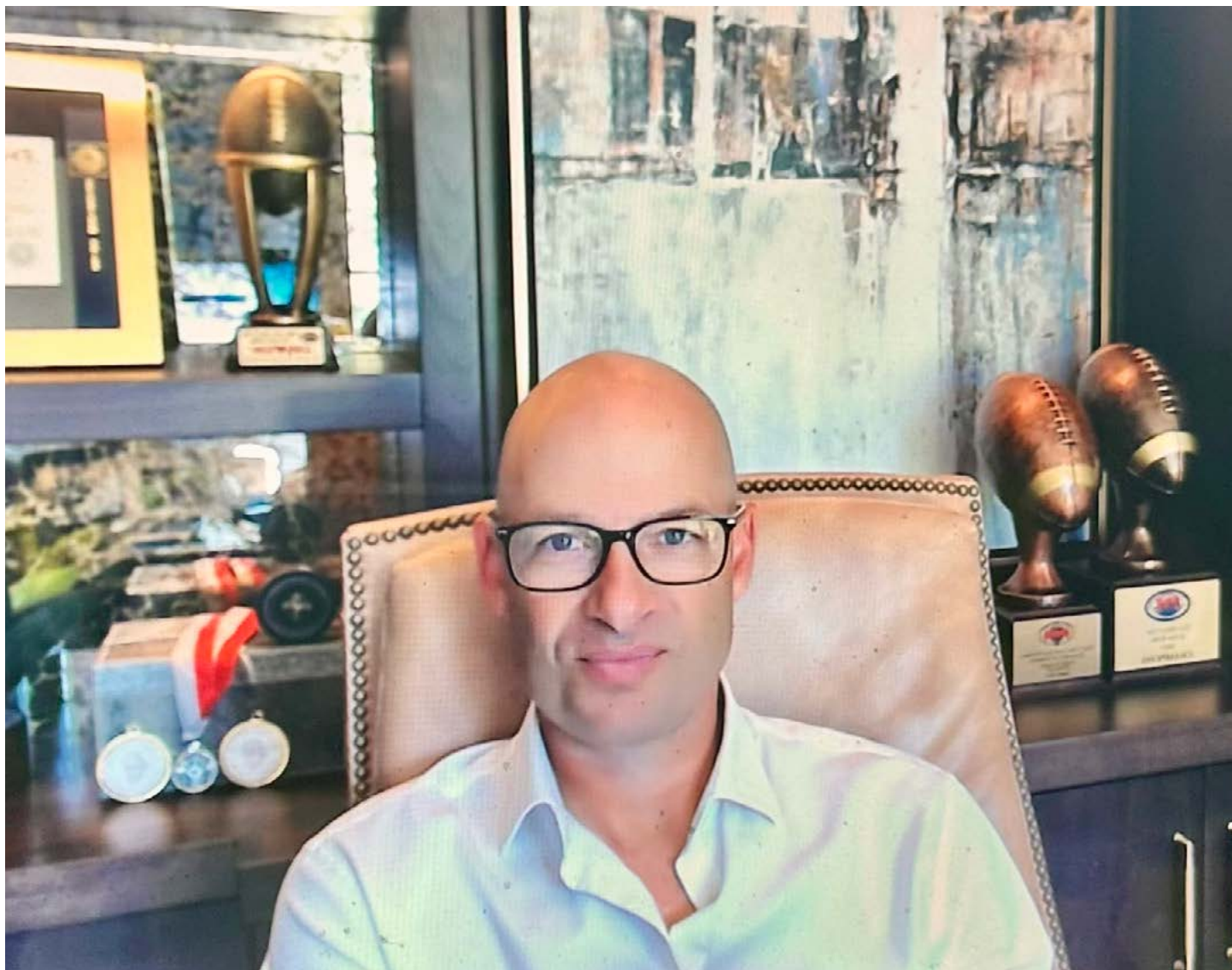
*Various members of the Tribe of Titans at a multifamily investment conference at "The Linq" in Las Vegas in April 2023. We were one of the event sponsors. From left to right: Rachael Jones, Justice Dougherty, John Burg, Brian Briscoe, Scott Matthews, Sara Rico, Steve Martinez.*

a mentorship on a podcast. This format resonates well with newer investors because the questions posed during the show often mirror those of our audience. Over the past three years, we've produced over 400 episodes with approximately 500 downloads per episode, accumulating over 250,000 downloads since our inception.

### **Your desire to help better the lives of others has been a profound driver throughout your career, from your investors to your employees, the residents of your buildings, to communities across the area. Why is this important to you?**

I believe it's rooted in my upbringing and the principle of giving before receiving. My faith, as a member of The Church of Jesus Christ of Latter-Day Saints, has also played a significant role in shaping this perspective. Additionally, my worldview was profoundly influenced when, at 19 years old, I spent two years on a mission in Chile with the church. There, I encountered people living in dire poverty, which left a lasting impact on me. Having witnessed extreme poverty in various parts of the world during my military service, improving the lives of others is at the core of my personal and professional mission.





# ALEX SONKIN

## FOUNDER

When Alex Sonkin came up with a business idea for his wife, he never dreamed that MacroBar would become America's leading protein and energy bar. The company they created, GoMacro, became so prosperous that she was able to quit her job as a teacher. But that success also led to new tax challenges for the family, eventually inspiring Alex to start his company, The Due Diligence Project™, which helps CPAs retain and attract high-net-worth clients by accessing a revolutionary due diligence system.

"When my wife's company took off, and we moved to California, I started working with family offices and CPA firms and soon realized that most CPAs didn't have access to the best tax planning strategies or have the time or resources even to know who to call for the answers," Alex says. He also realized less than 18% of Fortune 500 companies can zero out

their tax returns every year—meaning 82% of the world's most profitable companies cannot. Alex knew there was a massive opportunity to help elite tax professionals and provide them with the support they needed, and so it was that The Due Diligence Project was born. What started 15 years ago with Alex's firm providing education and resources to roughly 20 CPA firms has now grown into a global community of more than 700 elite CPA firms, law firms, and family offices providing independent ratings and rankings. The goal is to identify best-in-class, peer-reviewed resources and strategies in 10X less time and with 10X more confidence.

We caught up with Alex to learn more about his background, his passion for helping other professionals better serve their clients, and how he sees his company as similar to Amazon.

# Q&A

## What did you do before you launched The Due Diligence Project™?

I graduated from the University of Michigan's business school and have always been driven with new ideas and an entrepreneurial spirit to create something better. I was a member of the Chicago Mercantile Exchange (CME), the Chicago Board of Trade (CBOT), and the Chicago Board of Options Exchange (CBOE). The experience that I gained from making markets on the floor as a derivatives trader, combined with my finance background has really added a new perspective and competitive advantage when looking at what we are doing in terms of sophisticated tax planning.

## Why help lawyers and CPAs?

I am very competitive, and winning is very important to me. For me to be valuable, I feel like I have to contribute to a winning team. Figuring out how to be extremely valuable to this elite community and delivering on this has been a process. We found all these attorneys and CPAs who are the best and brightest at what they do but most need help finding and evaluating new ideas, while others need assistance explaining some of these complex strategies to their clients in a simple way. We have created this facility for a more streamlined, efficient process that makes everyone's job easier. Ultimately, we have become great at building winning teams, and building these teams with the very best resources is essential in order to achieve the best results. Our network of hundreds of CPAs continues this arduous vetting, ranking, and rating process on every specialist and strategy we are exposed to, so that our network can always have the most updated, elite team of financial experts worldwide.

## What makes your company so unique?

We have a revolutionary approach to tax planning; this is the first time anyone has done this. We look at tax planning and rely on those with at least 10,000 hours of experience in tax court, audits, etc. In our large community of tax professionals, each has their specialty and experiences, their own "data points," knowing to ask the right questions and provide the

feedback necessary to improve the process and resources. Business owners are happy to get their CPAs plugged into our network, and CPAs are excited because it saves them time and allows them to find the best ideas to reduce their clients' taxes and other costs. And, in turn, this generates more fees by enabling them to bring greater client value.

## What are some of the ways in which you help your clients?

We have five specific ways we work with our CPAs. First, we supercharge and elevate elite firms and multifamily offices, eliminating referral risk and other inefficiencies by installing a revolutionary process that reduces their time to complete tax planning due diligence and increase confidence by a factor of ten (10X). Next, they get instant access to our global network of specialists, thought leaders, and fellow community members which enables them to get questions answered quickly, while providing clients with first-rate knowledge, service, and support. Third, we position the CPAs as quarterbacks of the entire planning process, so they get credit for providing those solutions, which may be designed by world-class specialists working from the other side of the country. Fourth, they can deliver efficient, dynamic, proprietary tax, risk, or cost mitigation strategies without wasting time and energy. Finally, we further enable them to become their clients' most trusted advisors, offering so much value that no other competitor can compete with them. The ultimate result of all these benefits, is that many clients are simply compelled to refer their successful friends, family and partners to the CPAs plugged into our system.

## How is The Due Diligence Project™ similar to Amazon?

Amazon uses a peer-review ranking and rating system for products they sell or movies they stream, and we do the same thing but for tax planning. The difference is that our community of contributing voters consists almost entirely of elite tax-focused CPAs who have at least 10,000 hours or hopefully over 50,000 hours of experience in audits or tax court. Building this massive CPA community is a revolutionary approach to due diligence and tax planning. We are housing all the notes—rankings, ratings, and feedback—from all CPAs on hundreds of strategies, which helps others to do their analysis and due diligence much more efficiently.



**THE DUE DILIGENCE  
PROJECT™**

## CONTACT:

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# LEE RECTOR

CEO & FOUNDER



In April 2023, Lee Rector made a groundbreaking move in the supply chain industry when he founded Embassy Data Logistics Inc., a visionary supply chain software company headquartered in Sarasota, FL. With a career spanning 25 years, Lee's expertise as a management and supply chain consultant had already impacted over 60 of the Fortune 100 companies across 6 continents and in over 40 countries. His extensive experience involved optimizing warehouse and supply chain operations for global enterprises and training management teams for some of the leading 3PLs in the market.

As CEO and founder of Embassy Data Logistics, Lee embarked on the challenge of developing a unique product line that would revolutionize the market. His primary focus involved ensuring that the company's commercial aspects aligned with shareholders' interests. Embassy Data Logistics stands out as a trailblazer in the industry, driven by Lee's vision of bringing low-cost, high-value tools to the supply chain market. With a dedicated team of 12 professionals, Embassy has set its sights on

launching Warehouse Kommand, an innovative SaaS model labor cost and productivity calculator. This revolutionary solution provides unmatched adaptability for any operation in the market. Utilizing engineered average databases, Warehouse Kommand offers seamless calculations of costs, KPIs, and operational performance, all without the need for complex implementations or interfaces. Warehouse Kommand's accessibility is another cornerstone of Embassy's success. Clients can access the software from any computer worldwide, without any technological constraints. The streamlined process involves subscription payments, data input, and instant calculation of KPIs, time-calibrated standards and activity costs, all visible on the client's dashboard.

Lee's motivation for creating Warehouse Kommand stemmed from the realization that the market lacked easy-to-use tools, with countless interfaces adding unnecessary complexity at exorbitant costs. He believes in the company mantra: "If you can't measure it, you can't manage it." And he saw the untapped potential in enabling warehouses to measure productivity effortlessly and affordably. This simple yet transformative approach resonates with companies worldwide, as over 6.5 million warehouses lack the ability to measure productivity affordably and effectively.

Lee's journey to becoming a leading figure in the supply chain industry began with an honors degree in physiology and business from York University in Toronto. Armed with a strong educational background and fueled by a passion for innovation, Lee embarked on a mission to revolutionize the supply chain landscape, empowering companies to optimize their operations with ease and precision through Embassy Data Logistics Inc. This passion also led him to publish his first book in October 2023, exploring the intricacies of warehouse operations, planning, and design.

## CONTACT

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# ADAM KIDAN

PRESIDENT/CHAIRMAN

In the vast realm of business, where many chase wealth, status, and influence, there's a breed of entrepreneur that emerges from the crowd—those who prioritize giving back and creating a legacy. Adam Kidan, president of Empire Workforce Solutions and chairman of Empire Aviation USA, exemplifies this spirit. His tale is not just about corporate success; it's about redefining what it means to succeed.

At the core of Adam's impressive journey—from an attorney to an esteemed business leader—is his tenacity and an unwavering desire to offer opportunities. As he poignantly expresses, “When you're young your goals are different; to make money and build. As you get older and more successful, your goals turn to opportunities to help others.” It's this sentiment that steers the direction of his ventures.

Adam's first independent venture, Empire Workforce Solutions, stands out as a beacon of hope for over 20,000 individuals, many seeking their first professional position. By not just offering jobs, but crafting careers, he has demonstrated that business isn't purely transactional—it's transformational. Then, spotting a need in the aviation sector, Adam transitioned into Empire Aviation USA. Without a technical background, he leveraged his discerning business acumen to revolutionize the aviation maintenance industry, once again, making a mark.

Adam's journey, however, hasn't been without challenges. Hitting a rough patch in his 40s, he found strength in the support of others. This experience profoundly impacted him, reinforcing his belief that, “All people need is a chance.” Today, he stands as a testament to the power of resilience and the potential that can be unlocked with a little help.

Adam's dedication isn't confined to the corporate realm alone. An active philanthropist, he continues to serve on nonprofit boards, ensuring that he leaves an indelible mark on communities. His backing of the Crohn's & Colitis Foundation further showcases a holistic approach to giving, melding corporate responsibility with personal commitment.

In reflecting on Adam's journey, a quote by Winston Churchill springs to mind, “We make a living by what we get, but we make a life by what we give.” For Adam, his commitment to creating opportunities and ushering in change isn't just business—it's personal. As he continually climbs the ladder of achievement, he makes sure to raise others with him. It's this blend of success and service that makes Adam not just a business leader, but a source of inspiration in today's corporate world.



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## EMILIO DOMINGUEZ

### FOUNDER



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Emilio Dominguez, the ingenious mind behind Dreamers Only Hospitality Group, is redefining the food and beverage landscape with his unwavering passion for creativity and innovation. As an entrepreneur celebrated for his exceptional problem-solving skills and imaginative leadership, Emilio has left an indelible mark on the industry. His remarkable journey, chronicled in esteemed publications like *Forbes*, *CNBC*, and *Business Insider*, epitomizes resilience and exponential growth.

Named a prodigious talent on the rise, Emilio secured a coveted spot in the prestigious *30 Under 30* list by *US Reporter* in 2020. Under his visionary stewardship, Dreamers Only Hospitality Group has flourished, recording a staggering 1,300% business growth within a mere two years. The exponential surge isn't limited to the enterprise's trajectory alone; Dreamers Only's team has expanded by an astounding 800%. Emilio's dynamic leadership has also fostered partnerships with over 25 companies, a testament to his prowess as a collaborative entrepreneur.

Founded in 2022, Dreamers Only Hospitality Group stands as an embodiment of Emilio's visionary spirit. Home to distinguished concepts like The Modern Rose, Cleopatra Royal Coffee, Tesla Rentals, and ReDefine Juices, the group radiates innovation. Emilio's brainchild isn't confined to standalone ventures; Dreamers Only also excels as operational partners, as seen with their collaboration with YOYOSO Café in Miami's vibrant Wynwood district. With its roots firmly planted in South Florida, the company's reach knows no bounds, as they actively pursue ventures in Mexico, Saudi Arabia, London, and Beijing.

Emilio's entrepreneurial journey is a tapestry woven with passion and purpose. His initial foray into the industry began with The Modern Rose in 2019, transforming a modest furniture store into a captivating haven for coffee aficionados and tea connoisseurs alike. The establishment's success has burgeoned, expanding to two locations and drawing inquiries from across the United States and beyond. A true global citizen, Emilio's inspiration for Cleopatra Royal Coffee emerged from his time stationed in the Middle East during his service in the United States Air Force. The captivating allure of the region's culture, cuisine, and people drove him to create an exotic sanctuary that transcends conventional coffee experiences. With a mission to break the mold and redefine the café narrative, Cleopatra Royal Coffee stands as a testament to Emilio's unwavering determination to reshape industry norms.

As Dreamers Only Hospitality Group continues to push boundaries and pioneer new horizons, Emilio Dominguez stands as a paragon of entrepreneurial excellence. His indomitable spirit, innovative thinking, and relentless pursuit of smiles exemplify the ethos of a modern-day trailblazer reshaping the world of hospitality.

# Marya KHALIL-OTTO



In the heart of Hollywood, a bustling beacon of skincare innovation thrives under the thoughtful leadership of Marya Khalil-Otto, the empowering CEO of the Vitality Institute. With an unmatched dedication, Marya orchestrates a symphony of connectivity, not just within the sprawling corridors of her company, but within the very fibers of her being.

Each day, Marya steps into her role with an unwavering commitment to being the embodiment of the ideal employer. This isn't just a title for her; it's a mission. A mission to create an environment where ambition flourishes and the fervor to excel becomes second nature. Her schedule, a dance of meetings, discussions, and decisions, orbits around this mission, ensuring both the company's pulse and her personal ethos are in harmony.

Vitality Institute owes its inception to a personal quest that became a revolutionary legacy. Marya's father, the esteemed Dr. Abdala Khalil, birthed the company from a deeply personal place. The quest to find a cure for Marya's own skin tribulations led him to formulate the VI Peel—a chemical peel solution that transcended skin types and tones.

The twist of fate that crowned Marya as the company's torchbearer was one she never anticipated. When the mantle was passed onto her young shoulders a decade ago, she channeled her grief for her departed father into unwavering strength. Now, their signature professional treatments and their clinical skincare line—a paragon of their expertise—has become a staple across over 7,000 offices in the nation.

Marya's journey was far from linear. A journalism and film graduate from NYU, she morphed into a



*Photo Credit: Philip Macias*

**The Vitality Institute isn't just about business; it's about a principled commitment to humanity.**

licensed esthetician, skillfully embracing her role in her father's Miami practice years ago. When destiny beckoned her to Los Angeles, she breathed life into her father's legacy, diving headfirst into the enigmatic world of skincare and transforming herself into a polymath of business facets.

The Vitality Institute isn't just about business; it's about a principled commitment to humanity. This ethos echoes through the corridors of the company as they donate 10% of sales to clients' chosen charities and allocate 5% of online sales to organizations like Our House Charity and Saving Innocence, standing stalwart against the menace of human trafficking.



# PATRICK KELLY

Patrick Kelly is innovative, entrepreneurial, and influential in cybersecurity. He founded Gratitech and CyberArmor.ai, pioneering AI-driven cyber defense. Gratitech is protecting your privacy and delivering robust, AI-powered defenses tailored for national and global clients that include fintech, healthcare, aerospace, and insurance heavyweights, with clients such as Berkshire Hathaway, Blue Cross Blue Shield Association, Chubb, Fannie Mae, and United Airlines.

Patrick has built a reputation for creating cutting-edge, risk-managed software designed to meet the unique needs of each customer. His expertise shines in delivering AI-powered application protection, cloud defense, and proactive vulnerability and risk management that finds and fixes vulnerabilities. His work extends beyond corporate partnerships, including collaborative projects with the U.S. Government and Department of Defense.

As an author, Patrick commits to shaping the next wave of cybersecurity talent, developing a comprehensive AI-powered, hands-on application security video course for EC-Council.org, among other initiatives through Gratitech. His efforts are supported by a background in integrated studies and ongoing artificial intelligence, machine learning, and data science studies at Northwestern University.

In mid-2023, Gratitech introduced s3cr3tx, a versatile SaaS and on-premise product to protect you and your organization from breaches. It enhances existing secret management systems with additional encryption layers to secure sensitive data. Parallel to Gratitech's success, Patrick's venture, CyberArmor.ai, incorporates advanced AI-powered software and SaaS products that find privacy-protected data transmitted or stored in clear-text and uses CNSA encryption and post-quantum safe cryptography solutions to reinforce digital security and protect privacy.

Beyond technology, Patrick creates music as the artist, "Patrick Agile" with 118 original songs under his music label, Tenacious Corporation. Patrick actively contributes to society through Gratitech Research And Charitable Endeavor Corporation. This non-profit focuses on AI safety, supporting neurodiversity, and promoting open-source software.

Patrick's cybersecurity wisdom is trusted by top financial, insurance, government, healthcare, software, SaaS startups, consulting, and aerospace organizations; in 2022 alone, he helped safeguard over \$5 trillion in assets with Gratitech. His philosophy emphasizes proactive security, fortifying security in production, and ingraining security into development. Patrick's approach has earned recognition in the industry, a recent feature in *Entrepreneur Magazine*, and selection as author of the *AI-Powered Cloud Defense Course* for EC-Council.org.

Patrick Kelly's career is marked by innovative leadership in cybersecurity, commitment to education, public safety, security, and a diverse portfolio of ventures that attest to his mission to advancing cyber protection and giving back to the community.



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# Gregory Standal

“A singular video can make waves, but a consistent stream of content keeps the brand relevant in consumers’ minds.”

In the high-stakes world of video production, Gregory Standal’s journey is nothing short of cinematic. From a young age, Gregory developed a passion for filmmaking, creating home movies with his friends. As he grew older, his talents became more advanced. His steadfast determination led him to film school and eventually onto the sets of movies, shows, and commercials. Yet, it was in 2014, leveraging his deep-seated experience, that he transitioned into producing commercials.

Originally founded in 2011, New Cape Pictures became Gregory’s canvas to reimagine commercial video production. Based in New Jersey, the company emerged with a singular vision: to drive brand interaction and growth through compelling video-based solutions. “Every project is an evolution. It’s a chance to outdo ourselves, to elevate our clients’ narratives,” Gregory adds, echoing his company’s ethos of constant reinvention and growth.

But what truly sets New Cape Pictures apart is its client-centric approach. While many production houses take a broad-brush strategy, Gregory’s team delves deep. Their focus? Crafting video content tailored to resolve specific challenges faced by their clients. “Generic content creation isn’t our game,” Gregory states emphatically. “We zero in on problems, be it labor retention or lead generation, and design video strategies as solutions. Our content isn’t just about aesthetics; it’s about tangible outcomes.”

This commitment to creating result-driven content has earned New Cape Pictures a clientele that reads like a who’s who of the corporate world. “Working with big brands like MasterChef and Bissell was a testament to our capabilities,” Gregory shares. Yet, New Cape Picture’s portfolio, which also includes collaborations that drive results for smaller entities like Jan Fence and One River School of Art and Design, is a testament to its versatility.



For Gregory Standal, the true measure of success isn’t just in an array of clients, but in the impact our content has on each client’s business. He believes in the power of continuity: “A singular video can make waves, but a consistent stream of content keeps the brand relevant in consumers’ minds.”

Looking back at two decades in video production, Gregory’s most cherished moments remain the culmination of a project. That initial call, the storyboard, the conceptualization, and then seeing it all come together—it’s magic,” he says. “Twenty-five years in, and the thrill remains unchanged.”



**New Cape Pictures**

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# ROBERT JOHNSON

CO-FOUNDER



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"Creativity is thinking up new things.  
Innovation is doing new things."

- Theodore Levitt

In the heart of the bustling tech landscape, amidst the flurry of startups and digital innovation, stands a man whose journey defies convention. Robert Johnson, the co-founder of Think Tank AMC, wears his decades of experience like a badge of honor, each year etching stories of growth and transformation into his professional repertoire.

Entrepreneurial spirit, innovation, and, most of all, purpose, resonate in the very core of Robert's being. His drive is fueled not by profit, but by a desire to impact lives and steer industries toward meaningful change. For over twenty years, he navigated the unpredictable currents of software tech, scaling companies from their nascent stages to veritable industry forces. His tenure at a Denver-based software firm saw him elevate from a sales maverick to a pivotal figure, steering the ship as it surged from 35 employees to a formidable 350. But Robert's ambitions knew no bounds. In 2020, he embarked on a new odyssey, bringing Think Tank AMC into existence. The nationwide appraisal management company, operational across 25 states, stood as a testament to his dedication to customer service.

Frustrated by lackluster experiences with appraisal companies during his own real estate ventures, Robert and his partner seized the opportunity to rewrite the narrative. His partner's words, "Let's start a company and do things better," ignited a fire, propelling them to craft an entity where human interaction wasn't a relic of the past.

Robert's orbit expanded further as the VP of business development at Concept3D. This SaaS company orchestrated interactive mapping solutions for global giants, a role that harmonized seamlessly with his ethos of innovation. Through it all, networking remained his North Star. A self-professed 'corporate athlete,' he pursued professional development with the tenacity of an athlete training for the Olympics, constantly honing his skills to elevate his game.

Beneath the layers of professional rigor lies a man who finds solace in his roles as a husband and father. Robert's purpose crystallizes in his family – a wife and two daughters who infuse his life with boundless joy.

As he stands at the crossroads of his journey, the world wonders what this modern-day renaissance man will endeavor upon next. With an entrepreneurial spirit that courses through his veins and a heart fueled by purpose, Robert's story is not just one of success, but of meaningful influence, a testament to the extraordinary power of weaving innovation with humanity.

With over two decades of experience, Alison Cossette seamlessly integrates ethics with technical acumen to create a positive impact through technology. After getting her start in occupational therapy working with cancer patients, Alison wondered how to expand her influence. “If I could learn data science and couple it with my clinical knowledge, I could help the many, instead of one patient at a time.” Working with data at a hospital, Alison helped improve systems and, in turn, more people.

“Incorporating societal repercussions of data science is pivotal,” Alison emphasizes. In 2021, Alison founded Explain It - AI, a platform committed to algorithmic literacy and public education about AI. Two short years later, they launched a research division helmed by Alison’s husband, where together, they’re leveraging AI to bring greater accessibility to government data. Now in 2023, Alison is taking on her biggest challenge yet, launching Patrun, Inc., which licenses creator content for generative AI models. “The era of ChatGPT is upon us, and it is imperative that we get this right,” Alison explains. With Patrun, she establishes a groundbreaking initiative, the Pattern Rights Royalty Program, paying royalties to content creators for works utilized in AI models.

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**“We have a multi-billion-dollar industry built on creative works without compensation for these raw materials.”**

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Her initiative positions creators as essential partners in shaping the future of AI. Alison is recognized as a powerful voice working for the betterment of others. Named *Technology Innovator of the Year*, her influence transcends accolades as she is a teacher, mentor, and coach for women in technology, advocating for equity in the industry. She is a member of the NIST Generative AI Public Working Group and delivers speeches and keynotes across the globe on Artificial Intelligence.

Alison’s narrative is an inspirational evolution from healthcare nurturing to history-making AI stewardship, from singular therapy to global impact. With passion, she engineers a symbiotic partnership between technology and society, epitomizing responsible tech progression.

*Alison holds a bachelor’s from NYU and attended the master’s in data science program at Northwestern University.*



*Alison*  
**COSSETTE**  
FOUNDER/CEO



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# Christopher Milan

Chief Executive Officer

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As the CEO of Third Wave Business Systems, Christopher Milan is defining the vision, values, and strategy of the fast-growing consulting firm, headquartered in Wayne, New Jersey.

Third Wave is an SAP Business One Value Added Reseller (SAP B1 VAR). SAP Business One is an Enterprise Resource Planning (ERP) software system that helps businesses run by supporting automation and processes in finance, eCommerce, manufacturing, supply chain, services, procurement, and more.

As the first company to sell and implement SAP B1 in North America two decades ago, Third Wave has established themselves as a trailblazing SAP Business One consulting firm. With a dynamic team that operates across the continent, they have set themselves apart from others in the industry by integrating development addons to SAP B1, catering to industries like CPG, discrete manufacturing, medical devices, and wholesale distribution. Among their impressive offerings, they have developed the low-code web app, Versago, and the seamless integration workflow app, Bizweaver.

## The distinctive tools developed by Third Wave, Versago and Bizweaver, further amplify their value proposition.

Demonstrating the myriad functions and benefits of Third Wave solutions, Chris cites two examples: a robust financial management system enabling comprehensive financial reporting and KPIs; and an efficient inventory management system streamlining warehouse processes and reducing costs. The distinctive tools developed by Third Wave, Versago and Bizweaver, further amplify their value proposition.

Versago can be utilized for many different types of business needs such as customer/vendor portals, and efficient capturing of employee time for manufacturing work orders while leveraging mobile entry capabilities. Customers have discovered that it can address a multitude of challenges and drive improvements across their businesses. Meanwhile, Bizweaver shines as a powerful workflow driven integration

tool, effortlessly connecting SAP B1 to various other systems, including ecommerce platforms like Shopify, Big Commerce, and Magenta, all achieved without the need for complex coding.

Boasting over three decades of experience in the ERP consulting space, Chris has worked with nine diverse ERP solutions from six different publishers, so few are more qualified to define success in the industry. He attributes Third Wave's success to their exceptional talent pool, who embody deep expertise in the areas they serve. In addition, their commitment to helping customers effectively leverage SAP Business One has garnered them a stellar reputation as they continue to redefine the landscape of ERP consulting with cutting-edge solutions that propel businesses toward greater efficiency and success.

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# PHILIPPE BOISSAT

Philippe and his team's mission is to guide and support new entrepreneurs venturing into the aerospace sector, a field renowned for its complexity and challenges.

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In a world where the limits of innovation are constantly being pushed back, people like Philippe Boissat are beacons of inspiration. With a career spanning more than 25 years in prestigious companies in the fields of space, aerospace, and telecommunications engineering, Philippe's career illustrates the fusion of passion, expertise, and a deep commitment to making our planet a better place for future generations.

As CEO and founder of 3i3 Signature LLC, Philippe is not just a leader, he's a visionary. His mission is clear and unwavering: to harness the unlimited potential of NewSpace, the emerging private space industry, and put it to work for humanity. Philippe's day-to-day work doesn't feel like a job; it's a pleasure and a privilege to contribute to such a transformative field.

At the heart of Philippe's responsibilities and expertise is a deep understanding of aeronautics, with a particular focus on NewSpace and NewAviation. His career with renowned organizations such as Alcatel, Nortel Telecom, and IBM, has given him invaluable skills and experience in the telecommunications sector. Philippe was also one of the pioneers of space applications at Satellite Operators SES and EUTELSAT, where, since 2001, he worked to bring the Internet via satellite. In addition, Philippe is a telecom engineer and aircraft pilot with a wealth of experience in the French Air Force and Space Army. He is decorated with the medal of French Aeronautics and currently serves as a reserve officer in the French Air Force and Space Army.

Founded in 2022, 3i3 Signature LLC embodies Philippe's vision and dedication to NewSpace, NewAviation, aeronautics, and

space activities. Based in the dynamic city of Miami, Florida, this consulting company carries a unique distinction: it's also a luxury brand exclusively reserved for the aerospace sector. Philippe and his team's mission is to guide and support new entrepreneurs venturing into the aerospace sector, a field renowned for its complexity and challenges.

Observing the Earth from space has never been so crucial to the health of our planet and our collective future. Philippe recognizes the importance of satellite applications in addressing ecological challenges and ensuring the well-being of humankind. Contrary to popular belief, the aerospace industry is evolving, with environmentally friendly practices at its core. Jeff Bezos' hydrogen-powered rocket, for example, demonstrates a commitment to sustainable energy sources rather than traditional petroleum-based fuels.

In a world where the intersection of technology, sustainability and innovation is key to our future, people like Philippe Boissat and organizations like 3i3 Signature LLC are leading the way. As we look to the stars, let's not forget the profound impact we can have right here on Earth, and let Philippe's passion and dedication inspire us to reach new heights for the benefit of all humanity.







# Katrina Terry

Founder and CEO of LION195 Against Trafficking, Inc.  
Regional Managing Partner of J. Galt Finance Suite  
CEO of Champions Defender LLC

In the landscape of child trafficking advocacy, few figures loom as large and inspiring as Katrina Terry, the dynamic founder and CEO of LION195 Against Trafficking, Inc. For Katrina, the passion to help the most vulnerable emanates from a deeply personal space, finding resilience in a history marked by hardship.

At the age of seven, Katrina was abducted, an incident so significant that it made headlines and saw over 200 people fervently searching for her. Unfortunately for Katrina, her nightmare didn't end there. Between the ages of 9 to 16, she endured sexual abuse from a close family member, and later, while serving in the military, she faced more sexual trauma. Despite all of this, Katrina's narrative is not one of victimhood, but of resilience and redemption. She was blessed to heal both mentally and physically.

Today, with 20 years of executive leadership under her belt, Katrina brings to the table a distinctive blend of professional experience spanning cybersecurity, private investigations, bounty hunting and specialized talent acquisition. Her military service for the U.S. Navy during Operation Enduring

Freedom adds yet another feather to her impressive cap, but what truly makes Katrina stand out is her unparalleled ability to connect. Her story resonates with those she protects and advocates for, making her not just a figure to admire from a distance, but someone they see as relatable.

In June 2022, led by the Lord, Katrina founded LION195 Against Trafficking. Originally self-funded, it is now a nonprofit dedicated to empowering child survivors of sex trafficking, girls and boys ages ranging from infancy to 18. LION195's mission, however, is not just about recovery. It's giving the children a safe place to thrive and to teach survivors that their traumatic past doesn't dictate their future.

LION195 is currently spearheading a fundraising campaign for the LionHeart Children's Recovery Homes, dedicated to providing tailored recovery and healing support for survivors of child sex trafficking nationwide. This crucial initiative requires substantial support. The organization actively seeks corporate sponsors and donors, offering tax-deductible contributions to fulfill this vital mission.

Outside of her advocacy work, Katrina is dedicated to J.Galt's mission to empower entrepreneurs, where she ensures business owners can fund their ventures without endangering their personal assets. Recognizing the desperation many feel, especially when considering staking homes or education funds, J. Galt Finance provides pathways to true corporate credit and corporate rates at 0-5% without personal guarantees. In doing so, the company fosters business growth, ensures consistent cash flow, and protects entrepreneurs' personal wealth, offering them the financial security they need to thrive.

Rounding off her trifecta of businesses focused on making a positive impact, Katrina is the CEO of Champions Defender, a 100% woman-owned enterprise specializing in investigative employment background checks and cybersecurity solutions. Catering to businesses and nonprofits, Champions Defender operates on the belief that cybersecurity shouldn't be a luxury, reserved only for large corporations. Moreover, they are on the brink of securing contracts with school districts to meticulously vet potential hires, especially given that some serious offenses are often reduced to misdemeanors, which can escape cursory checks.

In Katrina Terry, we see the fusion of resilience, leadership, and an unwavering commitment to making a difference. Her multifaceted career, from a Navy veteran to a powerful advocate in multiple sectors, is a testament to the human spirit's indomitability. Katrina is not just a survivor; she is an emblem of hope, urging us to not only acknowledge the darkness, but to actively participate in bringing forth the light.



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# Robynn Storey

CHIEF EXECUTIVE OFFICER

Robynn Storey is the driving force behind Storeyline Resumes, an executive resume writing firm with an impressive 23-year legacy. Under her astute leadership, the company has evolved into the largest privately held executive resume writing firm in the United States, redefining the landscape of professional branding and career advancement.

With an illustrious career spanning over two decades, Robynn has orchestrated remarkable success, having collaborated with more than 350,000 clients. Garnering over a million followers on LinkedIn, Robynn's thought-provoking posts annually captivate a staggering 250 million individuals, solidifying her as an influential industry voice and catalyzing the firm's exponential growth.

Robynn's commitment to excellence extends beyond metrics. By sharing her personal anecdotes, industry insights, and astute observations on LinkedIn, she has cultivated a community of professionals who find solace and direction in her sagacious advice. She holds interviewers accountable, initiating a transformative discourse on job search ethics and interview dynamics. Her profound impact is exemplified by heartening testimonials from global executives, including a senior leader from a prominent European pharmaceutical corporation, who attests to Robynn's counsel as a lodestar for his career journey.

The genesis of Storeyline Resumes emerged from Robynn's resolute decision to reconcile her formidable corporate career with her maternal aspirations. Having flourished in esteemed roles such as Pepsi's marketing and communications powerhouse, she embarked on an unconventional journey. Supported by her husband's unwavering faith, Robynn traded her six-figure corporate job for the pursuit of entrepreneurship. Armed with a background in marketing and communications, she ventured into HR consulting, swiftly transitioning from family and friends' pro bono resume services to establishing a thriving enterprise.

Robynn's ingenuity lies in her avant-garde approach to resumes, meticulously crafting narratives that transcend job descriptions, instead spotlighting candidates' transformative impact. Her innovative pricing model, offering comprehensive



services below \$1000, demonstrates her altruistic ethos of maximizing accessibility to her expertise. This philosophy is harmoniously echoed by her advocacy for empowering women to integrate work and family life, fostering a remote and family-centric work culture.

As the embodiment of her company's values, Robynn's impact extends to media platforms, where she is a sought-after interviewee for television, magazines, and newspapers. Her upcoming book, *Career Confidence; No BS Stories and Strategies for Finding Your Power*, slated for release in April 2024, epitomizes her dedication to empowering career enthusiasts with authentic guidance.



## storeyline resumes

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# Joy HUNTINGTON

FOUNDER

"Entrepreneurship is about turning what excites you in life into capital, so that you can do more of it and move forward with it."

- Richard Branson



Joy Huntington launched her brand in May of 2019 to market her public speaking, workshops, and writing. Joy is Koyukon Athabascan from several villages along the Yukon River in Interior Alaska. She has been writing poetry for 27 years and journaling for 24 years. She is an entrepreneur, business owner, communications consultant, and public speaker.

Joy graduated with high honors from Dartmouth College in 2006 with a degree in Native American studies and a minor in environmental studies. She was also elected to the Fairbanks City Council in October 2015.

In May 2019, *Native Business Magazine* named Joy one of the *Top 50 Native Business Entrepreneurs in the Country*. Her business also received the *Indigenous Business of the Year Award* from the Yukon First Nations Chamber of Commerce for 2018.

Joy was also recognized as one of the 2019 *Top 40 Under 40 Native Americans in North America* by the National Center for American Enterprise Development. In 2020, Joy received the *Top 40 Under Forty Award* from the *Alaska Journal of Commerce*.

She is based in Fairbanks, where she lives with her daughters, Avery and Emma.

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# STEVE EMBERLAND, CPA

Silicon Valley native Steve Emberland, CPA, a seasoned executive with over 30 years of experience in high-tech, has found a new sense of purpose at Carrot Fertility, Inc. Born and raised in the heart of technological innovation, Steve's career journey has taken him through leadership roles in various technology companies. However, his latest venture at Carrot Fertility has brought a unique sense of impact, one that transcends the realm of driving revenue growth and corporate expansion.

Steve's career accomplishments are marked by his expertise in finance and operations and specialization in scaling technology companies. His proficiency has been showcased in his roles as VP of finance and administration for SoundHound AI, Inc., where he played a pivotal role in facilitating its public company listing on Nasdaq and helped to raise over \$200 million in equity financing, and as vice president and corporate controller for Consensus Cloud Solutions, Inc. which he helped spin off from J2 Global, Inc., producing a public company listing on Nasdaq.

In August 2023, Steve embraced a new challenge as the SVP of finance at Carrot Fertility, Inc., a pioneering and fast-growing global fertility care platform for employers and health plans. With Carrot's mission resonating deeply with his passion for technology and healthcare, Steve's decision to join the company was a natural progression in his journey. Carrot's unique offering of workplace benefits related to fertility care for all, along with its impactful services spanning over 130 countries, caught his attention. "Carrot reached out to me looking for a senior finance leader," Steve recalls, "The more I got involved in the process, met people, and learned about their mission, the more interested I became." The culture, kindness, and success-driven attitude of Carrot's team struck a chord with him, aligning with his leadership approach.

For Steve, leadership is deeply rooted in empathy and compassion. "I have an appreciation for the people on my team, and I operate as if they're actual human beings—because they are," he explains. His unique leadership style is driven by his desire to see his team thrive, both professionally and personally. This people-first approach has led to high retention rates and a motivated, engaged workforce.

Steve's journey with Carrot Fertility has given him the opportunity to contribute to an organization that has a profound impact on individuals and families. Guided by his commitment to making a difference and adding value, Steve continues to navigate the dynamic world of technology and healthcare with a focus on the human aspect—the heart and soul of innovation.

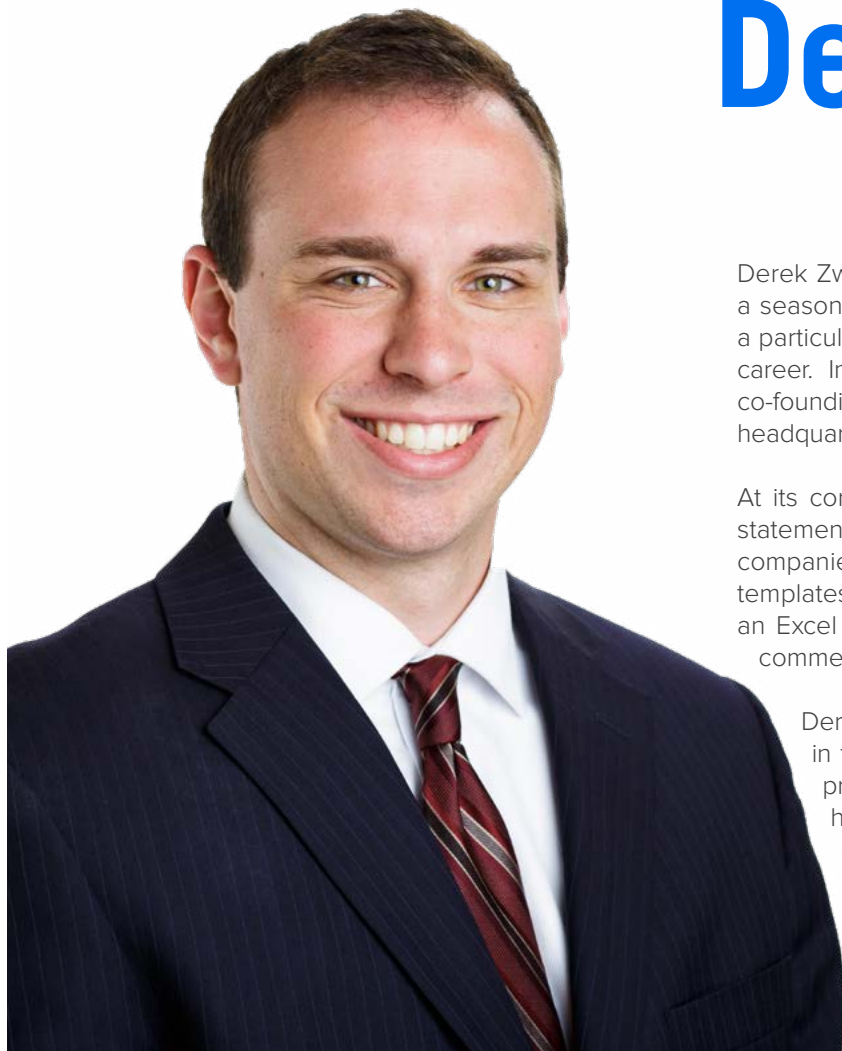


## CARROT

**"I have an appreciation for the people on my team, and I operate as if they're actual human beings, because they are."**

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# Derek Zweig

CEO/CO-FOUNDER

Derek Zweig, as the CEO and co-founder of Value Analytics, is a seasoned expert in quantitative risk and asset valuation, with a particular focus on closely held equity throughout his illustrious career. In 2021, he embarked on a groundbreaking journey, co-founding Value Analytics, a trailblazing market data firm headquartered in Pittsburgh, Pennsylvania.

At its core, Value Analytics is a provider of essential financial statement and equity data for exchange-traded, U.S. public companies. Additionally, they offer an array of analytics tools and templates, accessible through both a web-based platform and an Excel plug-in, catering to dozens of valuation analysts and commercial valuation enterprises.

Derek's vision for Value Analytics arose from a glaring need in the industry. Observing that competitors' services were prohibitively expensive and lacked affordable alternatives, he recognized the clear divide between firms that could afford big data providers and those that couldn't. Determined to level the playing field, Derek ingeniously isolated the critical business valuation component and offered it independently at a fraction of the cost. This innovative approach allowed industries with specific needs to access the platform efficiently and affordably.



Value Analytics

As a true analyst at heart, Derek remains deeply engaged in all aspects of analysis and tool development, a testament to his unyielding passion for the field.

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Value Analytics' distinguishing factor lies in its commitment to serving precisely what the valuation industry requires. By cutting out excess data and services, and organizing public company equity data—integral to the valuation process—in a clear and accessible manner, Derek's company became the most cost-effective option in the market. Their subscription basis of \$70/month pales in comparison to competitors charging hundreds or even over \$1,000 a month.

As a true analyst at heart, Derek remains deeply engaged in all aspects of analysis and tool development, a testament to his unyielding passion for the field. His active involvement in every facet of the company has proven invaluable for problem-solving and innovative product development.

Derek boasts an impressive array of credentials, including CFA and FRM designations, an MS in applied economics from Johns Hopkins, and ongoing pursuit of a graduate certificate in financial engineering at Columbia University. His expertise is further exemplified by his notable peer-reviewed papers, *Market Power*, *NAIRU*, and *the Phillips Curve*; and *Size and Capitalization Adjustments for Market-Based Pricing Multiples*. As Derek continues to spearhead Value Analytics, he remains at the forefront of revolutionizing the valuation industry, offering affordable solutions without compromising on quality and efficiency.

# John Dolan

## FOUNDER

John Dolan stands out in the world of specialized recruitment, carving a niche for himself as a highly successful and unconventional recruiter in the financial services and financial markets technology sectors. Unlike traditional recruiters, John brings a unique blend of hands-on experience, industry insight, and a keen understanding of the roles he seeks to fill.

With a background steeped in the intricate workings of the financial world, John's journey took an exciting turn two years ago when he launched Double Down Group. This bold endeavor quickly gained traction, and in its inaugural year, the business achieved a remarkable feat by generating nearly seven figures in revenue. A true testament to his prowess, this success was attained with minimal sales outreach, thanks to John's outstanding value proposition that resonated deeply with his clientele.

John's client base comprises enterprises offering essential technology, data, research, and other services to hedge funds, asset managers, private market, and sell side firms. Additionally, his partnerships with the buy and sell sides have further solidified his reputation as a go-to recruiter in these competitive spaces. What sets John apart is his firsthand experience in the industry. With a background spanning senior positions across sales, account management and product, he possesses a distinctive viewpoint that enables him to preemptively understand the needs of both clients and candidates.

John's approach hinges on his personal touch. Each candidate he considers undergoes his litmus test: "Would I hire this person myself?" This rigorous evaluation ensures that every referral he makes carries the weight of trust and credibility. With over 21,000 connections, his comprehensive LinkedIn presence and expansive network have further amplified his reach, attracting a stream of candidates and generating a substantial reservoir of potential matches for any given role.

While revenue generation is his forte, John's motivation extends beyond numbers. He thrives on the thrill of securing new business and bringing it to fruition. His reputation is underscored by clients' sentiments that the caliber and volume of candidates he presents in a week are on par with what other recruiters deliver over months. Moreover, John finds immense gratification in helping individuals land their dream roles, turning aspirations into reality.



John's journey traces back to his education at the prestigious Wharton School of Business, where he also excelled in Division 1 Varsity Baseball. Prior to launching Double Down Group, John spent a commendable 17 years at Eze Software. During this tenure, he played an instrumental role in building the company, expanding its footprint in New York, San Francisco, and London, and leading its North America Business Development team. He also enjoyed success as director of business development at BlackRock, where he was responsible for selling the Aladdin platform to asset managers in North America.

As John Dolan continues to redefine recruitment conventions, his story exemplifies the potency of industry immersion, first-hand expertise, and an unwavering commitment to excellence.

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— DDG —  
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EXECUTIVE SEARCH & ADVISORY

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# GREG GREGORIAN



**G**reg Gregorian's journey is woven with threads of patriotism, family values, and a relentless entrepreneurial spirit. Raised in a family deeply rooted in service, he embraced his heritage as an Armenian-American with a profound sense of duty towards his country. Greg's father, a decorated retired US Army major with five combat deployments, inspired him with his multiple degrees and unwavering dedication to serve. His Armenian-American mother, a pharmacist with a PhD, instilled in him a passion for leadership and excellence. His brother, a Naval Academy graduate and Naval helicopter pilot, paved the way for the academy lifestyle and is someone he always looks up to for guidance.

Following the footsteps of his family's legacy, Greg pursued a distinguished career trajectory. As a West Point alumnus, he exemplified his commitment to America by serving in Afghanistan with the 101st Airborne Division and earning a prestigious *Bronze Star*, following the footsteps of his father. After medically retiring as a captain from the Army, Greg's professional

journey encompassed roles as a medical device industry representative, a consultant for Deloitte, and a GS13 for the federal government. However, he found his true calling in entrepreneurship.

Greg's passion for entrepreneurship emerged early as he began selling products throughout middle school and high school. Embracing the challenges and rewards of being an entrepreneur, he adopted three fundamental principles: physical, mental, and financial fitness, which became the pillars of his lifestyle approach.

In June 2016, the idea for Lunar Branding® was conceived. Then a pivotal encounter at a conference in Las Vegas in October of that year set the wheels in motion. Guided by a marketing expert, Greg embarked on six months of extensive research and Lunar Branding® was officially established in April 2017. Absorbing as much knowledge as possible about this industry, Greg reinvested his early profits in branding conferences, where he forged connections with the industry's elite. His tenacity, branding capability, and accomplishments in the industry have earned him recognition, with publications in *PPAI Magazine*.

Headquartered in Los Angeles, CA, Lunar Branding® swiftly became a 7-figure business, specializing in creative marketing and promotional products. Setting itself apart with a focus on high-quality and unique items, as well as stellar customer service, the agency caters to a diverse clientele across the U.S.

Greg's odyssey exemplifies the American dream – a tale of a passionate and patriotic entrepreneur who, driven by his family's legacy, crafted a flourishing marketing agency that redefines the standard of customer service and fosters a sense of community in the process.



**LUNAR  
BRANDING®**  
Stellar Custom Merchandise®



Setting itself apart with a focus on high-quality and unique items, as well as stellar customer service, the agency caters to a diverse clientele across the U.S.

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# Annie Holmes

Co-Founder and Social Impact Strategist

In the realm of social impact and community development, few individuals embody dedication and innovation as profoundly as Annie Holmes. As the co-founder and social impact strategist of Elevated Levels Foundation Inc., Annie's journey and mission are a testament to the transformative power of determination, family, and the arts.

Annie's career has been a remarkable odyssey through the fields of education, justice, diversity, equity, and inclusion. With over 25 years of experience, including three tenures as the inaugural chief diversity officer for various organizations, she has been instrumental in breaking new ground in these critical areas. Her academic achievements, including a B.S. from Temple University and dual M.Ed. and a Ph.D. (ABD) from Pennsylvania State University, speak to her dedication to knowledge and growth.

Annie's impact has not gone unnoticed, earning her numerous accolades, including the 2019 and 2020 *Diversity Leader Award* from *Diversity Journal*, the 2022 *JEDI Award* from Pennsylvania State University, and the 2023 *Visionary Award* from the Internet 2.0 Conference. These accolades reflect her unwavering commitment to fostering justice, equity, and inclusion in all facets of society.

Elevated Levels Foundation Inc., founded in November 2022, is Annie's brainchild—a testament to her resilience and her family's unwavering support. Her journey to this point was marked by a successful career as a chief diversity officer. Still, as she reflects on the past, she acknowledges a point when she felt depleted, pouring herself into systems without receiving the same in return. It was a moment of reckoning, a pause in the chase for goals, and a reflection on her purpose in life. During this period of rest, Annie's family became her pillars of strength. Their conversations, rooted in societal concerns and the future they envisioned for their children, led to the birth of Elevated Levels Foundation Inc. Its three pillars—learning, art, and economic development—have not only been a source of inspiration for the community, but have also played a pivotal role in Annie's own healing journey, rejuvenating her mind, body, and soul.

Annie's passion for creativity and the arts, instilled in her through her artistic family, has found a new avenue of expression through the foundation's work. She now revels



in her ability to break free from corporate confines and think outside the box. Her background as an artist and her extensive education have converged, allowing her to embrace her creativity fully.

What Annie enjoys most about her work is her newfound liberation—the freedom to be as creative and out-of-the-box as she desires. She is now open to helping others and extending a hand to bring people along on this transformative journey. Her work with Elevated Levels Foundation Inc. is not merely about addressing symptoms but healing minds, bodies, and souls, with the conviction that changing individuals will ultimately change the systems that govern our society.



In Annie Holmes and Elevated Levels Foundation Inc., we witness a remarkable blend of passion, purpose, and innovation. Annie's story serves as a poignant reminder of the power of family support, the liberation of creative expression, and the potential to bring about positive change in our communities. Through their endeavors, they are not just elevating lives but also reshaping the social fabric, one pillar at a time.

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# JASON WEISS

FOUNDER & CEO



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Jason Weiss, the founder and CEO of Ask Jason Weiss, embarked on a transformative journey that transcended the boundaries of his legal career. After practicing law for over two decades, he found himself deep in introspection, pondering how he could reach beyond the conventional teachings of law school. "Throughout my career, I've always been a round peg in a square hole," Jason shares. "Unlike attorneys solely motivated by financial gain, I always prioritized the satisfaction of my clients, often leaving potential profits untapped. Money should never be a barrier to assisting those in need."

Jason had discovered that his true passion lay in teaching, offering guidance, and acting as a mentor. Harnessing the power of social media, particularly Instagram, he shared his story, resonating with countless individuals who stumbled upon his posts. Before long, Jason became a magnet for attorneys who sought greater satisfaction from their own careers. In his mission to help others navigate paths towards fulfillment when conventional legal avenues seemed unviable, Jason deftly guided them towards alternative business options that could leverage their law degrees.

Now, through Ask Jason Weiss and his podcast of the same name (available on Apple, iHeart Radio, Spotify, Audible, and Amazon), Jason illuminates pathways to fulfillment for attorneys stuck in the quagmire of unhappiness. With a proven track record as a dealmaker, a compassionate heart, and an unwavering commitment to mentoring others, Jason is a beacon of inspiration and transformation that transcends the confines of the legal profession.

Despite his myriad professional accomplishments, Jason's greatest fulfillment is as a devoted husband and father of two teenagers—an immensely talented son excelling in competitive lacrosse and a remarkable, multifaceted daughter. Proudly passing on his entrepreneurial spirit, both children established their own online apparel stores.

Jason's educational background includes a Juris Doctorate, cum laude, from the University of Miami School of Law, and a BA with honors from the University of Florida. Licensed to practice law in both Florida and Washington, DC, his exceptional skills and reputation led to his recent appointment as a board member of Benefits Specialist Inc. He was also elected president of the Leadership Coral Springs Class of 2011, a testament to his remarkable leadership abilities, and has also served as an adjunct professor of sports law at Nova Southeastern School of Law, an adjunct professor at St. Thomas University, and as a judge for the Broward County Teen Court Program.



## FABIANA F. GROSMAN CIOBATARU

FOUNDER & MANAGING PARTNER

Future growth and confidence are the principles by which Fabiana leads her life and FGC, where she is the founder and managing partner. With over 25 years of dedicated experience, she specializes in advising individuals, families, and businesses in crafting strategic plans for the future. Throughout her career, she built her portfolio and developed her expertise in tax law, wealth planning, and succession planning for high-net-worth individuals and their families.

What sets her apart is her distinct approach to client relationships, built on trust. She and her team possess an unwavering dedication to providing a top-notch service, always ready to lend a helping hand. Their commitment to client success is impar, making them a unique presence in the industry.

With a deep understanding of the international market, Fabiana guides international investors, entrepreneurs, businesses, and families, offering tailored solutions designed for cross-borders

individuals and families, including succession matters, estate planning, real estate acquisition, and strategic decision-making for foreign nationals.

At FGC, the client takes center stage. Their client-centric philosophy drives them to curate bespoke solutions, tailored specifically to each client, each investor, and every individual circumstance. This has earned them many loyal customers, with many of their clients having been with them since the company was founded. Fabiana emphasizes “Our focus I solely on our clients, and we are with them every step of the way, guiding them from start to finish.”

Fabiana is a Brazilian attorney with a master’s degree from the University of Miami. In addition to her native Portuguese, she speaks both English and Spanish. Her diverse skill set and extensive experience empower her to connect with clients on a global scale, transcending linguistic and geographical boundaries.





# CHANDLER LeGrange



Chandler LeGrange, a visionary leader in the security industry, stands at the helm of Valen Surveillance & Security, LLC as its CEO and founder. With an unwavering commitment to revolutionize the conventional security landscape, he embarked on this transformative journey driven by a conviction that traditional security methods were fostering a false sense of safety. Drawing from his extensive experience in the oil and gas sector, Chandler recognized the need for innovative solutions to address security challenges. With a strategic focus on delivering both cutting-edge products and unparalleled customer service, he aimed to introduce a paradigm shift in the industry.

Chandler's multifaceted role encompasses overseeing the entirety of operations, spearheading marketing initiatives, directing field operations, and orchestrating the company's exponential growth trajectory. Three short years since its inception, Valen Surveillance & Security has rapidly evolved into a multimillion-dollar enterprise, a testament to Chandler's visionary leadership and tenacity. Central to their success is the company's steadfast dedication to customer service excellence. Bucking the trend of automated interactions and distant call centers, Valen Surveillance & Security prioritizes quality products and personalized service.

Valen Surveillance & Security prides itself on being a beacon of innovation. Through strategic partnerships with global industry leaders, the company has harnessed some of the most advanced technologies available. Their diverse portfolio includes X-ray machines, perimeter security solutions such as radar and thermal imaging, and contraband solutions tailored for correctional facilities. Chandler's brainchild also plays a pivotal role in enhancing security within the oil and gas sector, fortifying critical infrastructure and substation security. The company's impact however, extends well beyond commerce. Valen Surveillance & Security collaborates closely with local government agencies, contributing to community safety efforts and disaster response coordination. In the Gulf South region, they've been at the forefront of disaster response during hurricanes and natural calamities, exemplifying their commitment to safeguarding what truly matters.

Akin to his past service in the armed forces, Chandler's mission to safeguard the irreplaceable. Whether it's securing vital infrastructure, educational institutions, or critical assets, he understands the profound responsibility of preserving the intangible. Through Valen Surveillance & Security, Chandler LeGrange is crafting a legacy defined by innovation, service excellence, and unwavering dedication to protecting the world we inhabit.

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# ELLEN BUCKLEY

Ellen Buckley stands as the visionary founder and CEO of Prospera Real Estate Collective LLC, an emerging force in real estate development and consultancy headquartered in Miami, FL.

Ellen's mantra is clear: solving problems in new ways, coupled with bold capital investment, produces lifestyle breakthroughs that people have not yet seen. While vision is often confined to the mind, it is the idea brought to life that defines Prospera Real Estate Collective as a crucial channel for housing and nurturing vibrant communities.

Ellen's foray into real estate commenced at the age of 14, starting her journey by transferring deeds at an Ohio courthouse. Carving a unique path, she defied convention by entering a male-dominated sector, becoming a laborer for a construction enterprise at just 17. Following early on-the-job training, Ellen pursued a bachelor's degree in architecture at the University of Miami, graduating at the top of her class. This foundation led her to architectural practice in Philadelphia, where she observed decisions that fell short of their potential. This catalyzed her resolve to author impactful outcomes.



Ellen's mantra is clear: solving problems in new ways, coupled with bold capital investment, produces lifestyle breakthroughs that people have not yet seen.

Driven to broaden her horizons, Ellen returned to academia, securing a master's degree in historic preservation from the University of Pennsylvania and a Real Estate Development & Finance Certificate from the Wharton School of Business. From there she launched her career in real estate development, embracing diverse assets like iconic landmarks, luxury condos, master planned communities, and mixed-use retail. From overseeing a 432-acre master plan community project on the Main Line Pennsylvania to immersion in international projects located in Bangkok, Thailand and Malaysia, these cross-cultural experiences bolstered her business acumen. Her return to the United States saw her orchestrating large-scale projects as head of development at Terra, including the prestigious Park Grove luxury condo project, transit-oriented mixed use development projects, and an 800-room Grand Hyatt hotel on Miami Beach. A nine-year journey at Terra culminated with Ellen's decision to chart an independent course, spurred by her desire to channel her experience into community-centric impact development.

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Ellen's present pursuits are imbued with an intentional desire to improve the communities in which she works. She relishes her creative latitude, crafting innovative living paradigms that harmonize with economic growth. One way that her devotion to a thriving economy manifests itself is through workforce housing advocacy, particularly in underserved neighborhoods. By fostering affordable home ownership and addressing new standards for living at all socio-economic levels, from luxury, to senior, to workforce, Ellen ensures that people from all walks of life can have a dignified, vibrant life.

Ellen's ultimate gratification rests in witnessing her ideas evolve into vibrant communities. A true advocate of innovation, she envisions a legacy of progress, utilizing her multidisciplinary foundation to shape a prosperous future for generations to come.



**PROSPERA**  
real estate collective





## DR. BENJAMIN ISAAC ARTHUR

Dr. Benjamin Arthur is a visionary in the field of biotechnology, serving as the co-founder and chief innovation and scientific officer of PolyRegen Biosciences, Precision Health & Wellness Medspa, Provix, and founder of Informnity. With a multifaceted background and a passion for unlocking the body's natural healing potential, Benjamin has spearheaded groundbreaking initiatives that are transforming the landscape of health and wellness.

Benjamin's journey to the forefront of the biotechnology industry is marked by his unwavering commitment to multidisciplinary integration. Armed with an exceptional education from top-tier institutions and enriched by practical experience, he brings a unique perspective to the field. His early career in academia allowed him to impart knowledge in genetics, mathematics, and neuroscience to aspiring students, and his innate fascination with how things work led him to uncover medical paradigms, particularly in the shift from "diagnosis and treatment" to "prediction and prevention."

At the heart of Benjamin's philosophy lies a deep belief in the body's innate ability to heal itself. He champions natural products and endeavors to create the optimal conditions for the body to repair and rejuvenate. PolyRegen Biosciences, under his leadership, is committed to personalized precision in healthcare solutions. Benjamin's genetic background serves as a blueprint, and he meticulously explores how genetics interact with the environment, delving into the realm of epigenetics. Moreover, he is a staunch

advocate for understanding how natural products, including those derived from plants, have co-evolved over millennia with animal life, and how our body systems inherently know how to properly interact with them. Even within the realm of biopharmaceuticals, Benjamin's focus remains firmly rooted in natural elements, firmly asserting, "The problem is, we don't yet have the technology to faithfully reproduce what we see in nature to apply to our body. This is a major reason why laboratory synthesized medications typically have adverse effects."

Among Benjamin's most cherished accomplishments is the inception of PolyRegen Biosciences, a company dedicated to pushing the boundaries of science-based health and wellness products and services. The company's core philosophy revolves around the interplay between personalized genetics and cutting-edge molecular bioscience. They are pioneering a rigorous science-based approach to product development, emphasizing the potential of perinatal tissue, naturally endowed with immune modulation and regenerative capabilities. With FDA registration, PolyRegen harnesses the power of stem cells derived from the umbilical cord, a time when the cells are most potent, but not excessively so, to address a myriad of health issues, from arthritis and back pain to wrinkle removal and hair regrowth. His other major effort involves developing a regulatory regime specific for processing of stem cell products to replace the current mismatched pharma manufacturing model.

PolyRegen Biosciences adopts a holistic systems perspective when tackling healthcare challenges. They view the body as an interconnected system and every endeavor is firmly grounded in science and supported by ongoing studies to substantiate their approach.

In an era where natural solutions are increasingly sought after, PolyRegen Biosciences stands as a beacon of hope. They believe in harnessing the power of nature to care for our bodies, utilizing natural engineering to facilitate healing. Benjamin Arthur's work is not just about innovation; it's about enabling people to live pain-free, improving their quality of life, and empowering them to experience the body's incredible regenerative potential.



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# JAZMINE GONZALEZ

## When a Hobby Turns into a Career

While in college, Jazmine Gonzalez took a job performing as an MC at events on the weekends when she wasn't playing sports. Although she was successful, she considered it a hobby, and once she graduated, she planned on becoming a news anchor. That changed when Jazmine was encouraged by event planners to stay in the events industry. She decided to open her own entertainment production company, H.Y.P.E. Productions (How You Prefer Entertainment). That quickly turned into a highly successful career as an event specialist whose team travels nationwide producing some of the most exciting entertainment ideas. Six years ago, she opened a second business, Loft 21, a 31,000-square-foot venue, effectively creating a one-stop shop for clients.

As president of both companies, Jazmine oversees all day-to-day operations, including interacting with customers, managing sales and marketing, and handling the creative aspect of all events. From weddings and corporate events to charity galas, bar mitzvahs and more, Jazmine and her staff of professional entertainers strive to make every event unique for each client. Both companies boast the latest technology in lighting, sound, video screens, mechanical walls, ceiling trap doors and more. Loft 21 features an industrial, ultra-modern feel that allows each event to design from a blank canvas.

Immensely proud of the 80 people on her team, many of whom have been with the company for years, Jazmine and her team work seamlessly together and are passionate about helping people create memories. She never refers to herself as the boss, but rather sees herself as a team leader and coach. "I am a minority female in a male-dominated industry, and it is rare for someone like me to have this level of success. To share it with my team is the biggest reward," Jazmine says. "I hope my experience and my story will encourage other women to dive in, chase after your dreams, and don't ever let anybody stop your hustle. You can have it all; an entrepreneur, wife, and mom."

Jazmine won an award for *Entertainer of The Year* at the Taj Mahal in Atlantic City two times. She is also very active in a group called Step Up, an organization that encourages young women to be confident in moving forward and becoming entrepreneurs. Her newest project is called Christian Athletes Alliance, where she mentors young athletes on balancing school, sports, friends, and family, while centering it around keeping their faith a priority.



“ I hope my experience and my story will encourage other women to dive in, chase after your dreams, and don't ever let anybody stop your hustle. You can have it all; an entrepreneur, wife, and mom.

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# Matt Kallstrom



## The Global Improvement Group

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In the bustling world of corporate America, where profit margins reign supreme, one man dares to dream of a more fulfilling purpose. Meet Matt Kallstrom, founder and CEO of The Global Improvement Group, a visionary leader on a mission to make a significant difference in the world.

Having worked in the corporate grind, Matt realized he wanted to leave a lasting legacy; one that would positively impact the world. In realizing this, Matt created The Carbon Offset Company, later rebranded as The Global Improvement Group, a name that aptly represented their broadening scope. Matt and his team focus on holistic ecosystem restoration, currently, through reforestation efforts worldwide. By planting over 2,300,000 trees as of August 2023, they not only reduced carbon emissions, but also brought about a much-needed economic boost to the communities they worked in, improved water and soil quality, and fostered biodiversity.

The Global Improvement Group's purpose is clear: to align businesses with the planet and make a substantial positive impact. They inspire and enable business leaders to embrace sustainability as a core value and champion environmental

responsibility. With a team spread across six countries and partners in over 20 more, the company's reach is truly international. What sets them apart from competitors is their culture and vision. Instead of merely chasing profits, The Global Improvement Group truly cares and are driven by a desire to create a better world. "I bootstrapped this company without PE and VC funds and brought on team members who truly care and actually want to make a huge difference in the world," Matt shares.

As The Global Improvement Group continues to expand, they are exploring new avenues to bring about positive change, including projects to remove plastic from the oceans and provide essential resources like education, clean water, and food to areas in need. In the world of sustainability, where trends come and go, Matt's vision stands firm as a beacon of hope. The Global Improvement Group is not just a company; it's a movement, led by a passionate CEO and a dedicated team, determined to shape a better future for generations to come. Matt challenges all business leaders to take ten minutes to see how easy and impactful it can be to align their business with the planet.

# DR. AYYAPPAN K. RAJASEKARAN

FOUNDER/PRESIDENT/CEO



Dr. Ayyappan K. Rajasekaran, widely known as Dr. Raj, is a visionary entrepreneur and distinguished scientist with an unwavering commitment to combating cancer. With a diverse portfolio of accomplishments, Dr. Raj has established himself as a trailblazer in multiple domains, ranging from groundbreaking medical advancements to revolutionary gardening solutions.

Dr. Raj's transformative journey began during his formative years when the poignant sight of suffering cancer patients ignited his lifelong mission. Witnessing the distressing scenes within the cancer ward during a hospital visit with his father, a nurse, spurred him to unravel the mysteries of this formidable disease. Driven by a burning desire to fathom its complexities, he embarked on a path of relentless pursuit. Over the past three and a half decades, his dedicated focus on cancer research has borne fruit, leading to the creation of a groundbreaking cancer treatment drug and a novel nanoparticle-mediated cancer drug delivery for childhood leukemia. Today, his enterprise, Therapy Architects, is poised to turn these pioneering inventions into a life-saving reality.

Dr. Raj's impact has reverberated across academia, with a storied career that includes prestigious appointments. Notably, he served as a professor of pathology at UCLA, a pediatrics professor at Thomas Jefferson University, and the founding director of the childhood cancer center at the Alfred I DuPont Hospital for Children. Dr. Raj holds a Ph.D. in biochemistry from the esteemed Indian Institute of Science in Bangalore, India, and an executive MBA from the Anderson School of Management at UCLA. To date, he has also been issued 10 patents.

Dr. Raj's altruistic aspirations have manifested in the form of the Cancer Vision Foundation, a non-profit organization dedicated to educating young minds about cancer prevention. He traverses the



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**"Make your goals a reality: Ignite them with passion and fuel them with the enduring forces of hard work and perseverance."**

globe, delivering impassioned talks in schools, emphasizing the vital role of prevention in combating cancer. Dr. Raj's ambition knows no bounds; he envisions integrating cancer education into school curricula worldwide, collaborating with leaders in the White House, and pursuing dialogue with the World Health Organization.

Beyond the realm of medicine, Dr. Raj's ingenuity extends to his leisure pursuit—gardening. Frustrated by the relentless battle against weeds, he devised an ingenious solution. His brainchild, Weed Free Gardening, promises to revolutionize the gardening landscape. This innovative system eliminates the need for weeding and watering, allowing effortless cultivation and bountiful harvests. Scheduled for release on Amazon in September 2023, Weed Free Gardening stands poised to reshape how we nurture our green spaces.

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# Denise MURTHA BACHMANN

SELLOVATORZ™

In the ever-evolving terrain of sales, Denise Murtha Bachmann stands as a luminary, seamlessly blending her rich background with a forward-looking vision. With over three decades of sales expertise under her belt, she holds the reins as the co-founder and CEO of Success with AI, a venture that's redefining sales education while prioritizing human connection.

The birth of Success with AI in the summer of 2022 marked a transformative juncture. With an impressive track record boasting over \$75 million in sales and the construction of a pipeline exceeding \$200 million, Denise embarked on a mission to foster growth in sales professionals. Her coaching and consulting services, honed over years of managing and mentoring individuals, underscore her commitment to nurturing talent.

The premise of Success with AI is as innovative as it is vital. An amalgamation of group coaching, mastermind sessions, and personalized guidance, this endeavor transcends mere sales instruction. Denise's brainchild, Sellovatorz, emerged within this framework, setting itself apart by guiding individuals to adopt and adapt to AI while cultivating and elevating the human experience. Anchored in the contemporary digital landscape, her programs are uniquely positioned to cater to the demands of the evolving sales world.

Central to Denise's endeavors is the aspiration to build a legacy that harmonizes financial accomplishment and emotional fulfillment. Having recently turned 50, her focus is resolute – she envisions a path that not only elevates her clients, but also leaves an indelible impact on her children, aged 14 and 9. This dynamic vision encompasses diverse trajectories, whether empowering clients with enhanced skills, fostering human connections, or achieving unprecedented sales milestones.

What sets Denise apart is her unwavering commitment to crafting experiences. In an era dominated by digital interfaces, she recognizes the enduring value of real human connection. Her mission encapsulates a profound desire to drive positive change, guiding others to embrace their finest selves. The pinnacle of Denise's achievements, amid an array of accolades, remains her entrepreneurial leap. Embarking on her own business journey, a dream cultivated since childhood, she exemplifies the spirit of a true trailblazer.

In a landscape where technology drives transformation, Denise architects an environment where growth, evolution, and genuine connection converge, fostering the best in individuals and setting a formidable standard for the industry at large.

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# CHRIS BROWN

Chris Brown, a seasoned entrepreneur with over 25 years of experience in the service industry, is the driving force behind the remarkable success of Premier Grease Recycling, LLC. From his humble beginnings working at his father's grocery store as a teenager, Chris's journey has been characterized by unwavering dedication, industry expertise, and a strong commitment to customer satisfaction.

In 1978, at the age of 18, Chris embarked on a career in the baking industry, managing and operating a bread route. His relentless determination and relentless work ethic propelled him from a route salesman to roles of increasing responsibility, including supervisor, sales manager, and director of sales over the span of 22 years. In 1998, seeking new challenges, Chris joined the second-largest rendering company in Texas as a procurement representative. His strategic vision and adept relationship-building skills were instrumental in catapulting the company's market share from 55% to an impressive 95%. His rise within the company continued, culminating in his promotion to Western Region district manager in 2008.

In 2016, Chris made a bold decision to transition into a new industry altogether. He purchased a grocery store in Lubbock, Texas, aiming to leave behind the rendering of animal by-products. Fate, however, had other plans. A call from a former customer and friend in late 2018 highlighted a gap in the grease recycling market – a gap that Chris was uniquely qualified to fill. With resolute determination, he sold his grocery store utilizing his retirement funds and established Premier Grease Recycling, LLC in early 2019.

At Premier Grease Recycling, Chris's primary responsibilities include fostering exceptional customer relationships, expanding market share, and business development. Under his leadership, the company has thrived. Starting with just one driver and 77 accounts, Chris's commitment to both clients and employees has propelled the company's growth. Today, Premier Grease Recycling services an impressive 2,438 customers across three branches in San Antonio, Lubbock, and Abilene, Texas, boasting a team of 16 skilled professionals and a fleet of six vacuum trucks.



Beyond achieving outstanding growth, Chris's vision emphasizes integrity and service excellence for clients, complemented by his steadfast commitment to employee well-being. His leadership ensures that their first 77 customers are never forgotten as they remain the cornerstone of Premier Grease Recycling's identity. As Chris continues to shape Premier Grease Recycling's path, we can be sure that its future will be defined by excellence and innovation.



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## Rama Prasad

FOUNDER/CEO

In 2016, Rama Prasad, a brilliant electromechanical engineer with an impressive background in large global IT corporations, embarked on an unconventional journey. At 45 years old, she decided to break away from the traditional career path and venture into the world of entrepreneurship. Realizing that her vast experience in consumer

electronic products could be channeled into creating something unique and innovative, she founded Teqnizan Inc., a Minnesota-based start-up with a groundbreaking vision.

Teqnizan Inc.'s flagship product, earrings with full audio function and Bluetooth connectivity, captured the imagination of consumers everywhere. These earrings not only allow wearers to enjoy hands-free convenience, but also ensure that urgent calls and music are always within reach, clear and secure. With optimized sound levels, the audio quality is exceptional within two inches of the earrings, while being discreetly inaudible beyond six inches. Additionally, they are designed to stay securely in place during exercise or daily activities and boast an impressive battery life of up to 6 hours on a single charge, earning rave five-star reviews from satisfied customers.

Rama's entrepreneurial journey was driven by a strong belief in her product's potential to make a meaningful impact in the world. "What drove me was the vision, the belief that this product was better than what existed, that I was making an impact, and that if I didn't do it, it would never happen. I thought I was making the world better in my own small way. I'm so thrilled that people like it so much. That's the real validation, for me—customer endorsement," Rama shares. And this passion, dedication, and vision did not go unnoticed, as Rama received several accolades throughout her journey. She was honored with the *HP Star Employee Award*, recognized with the *2022 Outstanding Leadership Award* from Internet 2.0, and listed among *Marquis's Who's Who of America* in 2023. Notably, Teqnizan's accomplishments were also acknowledged when Rama's team won the prestigious *Innovation Award* in 2022 from Launch Minnesota.

Today, Teqnizan's products are available through their Shopify storefront, ensuring swift shipping within 24 hours and delivery in 2-3 days. Moreover, Rama is open to collaborating with exclusive and eclectic storefronts, as well as partnering with other jewelry brands to further expand the reach of her ingenious creations.

*Rama holds a PhD in micro electromechanical systems from Cornell University and a Bachelor of Technology (BTech) in mechanical engineering from the esteemed Indian Institute of Technology.*



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**David York**, managing partner at Intrepidus Talent Solutions, orchestrates a symphony of operational excellence. With a career spanning over 25 years, his collective experience in search and recruitment, interim staffing, and human resources consulting has paved the path to mastery.

A common thread that weaves through David's journey is a consistent alignment with industry pinnacles, fortifying his status as a catalyst for excellence. His ascendancy within the talent acquisition and human resources space has seen him traverse many different industries. From steering the helm at esteemed giants like PwC and KPMG in the professional services realm, to carving a niche in aerospace and defense, his acumen has consistently propelled organizations forward. Notably, as the global head of recruiting for Creative Artists Agency, he strategized alongside executive luminaries to amplify the agency's influence in the entertainment domain, and a subsequent sojourn at Amazon witnessed David's ascendancy in the advertising technology landscape.

Intrepidus Talent Solutions was co-founded by David and his partner, Rodney Stigall, to offer holistic human capital solutions, from team augmentation to interim support and expert advisory in multifaceted HR domains. Their strategic focus on IT, engineering, finance, accounting, project management, and HR underscores their industry-agnostic stance, and with dual offices in Melbourne, FL, and Los Angeles, CA, they have assisted a multitude of clients in North America.

David's academic pedigree, boasting a BA in business economics from UCLA, a master's in human resources and organization development from the University of San Francisco, and a Workplace Diversity Certificate from the University of South Florida, mirrors his relentless pursuit of knowledge. As a driving force behind Intrepidus Talent Solutions, his legacy continues to reshape the contours of contemporary talent ecosystems.



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In the realm of strategic business leadership, **Jennifer Pereira** emerges as an exceptional example of how one person can make a huge impact. Standing at the helm of Fluent Motion Inc. as its founder and CEO, Jennifer has carved a distinctive path, redefining the boundaries of consultancy and service provision across diverse industries. Her vision is rooted in the idea of not merely treating ailments, but facilitating complete recovery and independence.

With a multifaceted role encompassing oversight and development of corporate strategic plans, business development and public relations, and operational subject matter expertise, Jennifer's impact resonates across the spectrum of Fluent Motion's operations. Focused on a profound mission, Fluent Motion strives to be the "trusted advisor" to global businesses, organizations, and individuals, fostering an environment of sustainable growth and quality enhancement.

Jennifer's journey reflects her deep-rooted commitment to kinesiology, occupational health and safety, human resources, training, and auditing services. Over 22 years of consulting and training expertise have solidified her reputation as an expert, fostering innovative solutions to intricate challenges. Her pro-active approach to problem-solving has brought transformative results to hundreds of companies worldwide. In fact, the impetus behind the inception of Fluent Motion stemmed from Jennifer's unwavering desire to empower individuals to reach their full potential.

With a robust focus on employer partnerships, Fluent Motion specializes in training, onsite safety, and injury prevention. Jennifer's unique position as a Registered Kinesiologist (R.Kin), Canadian Registered Safety Professional (CRSP), Doctorate of Acupuncture (DAC.), and Environmental Professional (EP) with five specializations underscores her versatile expertise.



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### *Pioneering Psychology and Business from the CIA to the C-Suite*

In the realm of executive advisement, **Dr. Dee Soder** stands as an unparalleled luminary, leaving an indelible mark on both individuals and corporations over her decades-long career. Renowned as the founder of the CEO Perspective Group, Dee's influence extends far beyond the boardrooms, earning her accolades in esteemed publications like the *Wall Street Journal* and *Fortune*, as well as popular media such as CNN and CBS MarketWatch.

Establishing her company in 1986, Dee embarked on a transformative journey that harmonized psychology and business strategy, an innovative approach that was conspicuously absent at the time. Partnering with luminaries like CEO, Richard Clarke, and trailblazing political figure, Geraldine Ferraro, her brainchild soon grew into a sanctuary for executives seeking astute counsel. Her strategic collaborations with industry experts ensured clients received counsel of the highest echelon.

Championing a modus operandi fueled by the fusion of psychological insight and strategic acumen, Dee is more than an executive coach; she's an assessor extraordinaire. With a background steeped in psychometrics and forensic psychology, her assessment methodologies lay the bedrock for profound coaching interventions. Having guided clients from across the globe, her clientele spans industries, continents, and cultures. Confidentiality, objectivity, and a nonjudgmental stance hallmark her service, rendering CEO Perspective Group a place for leaders to excel. From her iconic Rockefeller Center tenure to modern-day virtual collaborations, Dee's reach remains boundless.

Dee's educational trajectory spans postdoctoral honors in assessment and forensic psychology, a PhD and MS in industrial psychology, and a distinguished BS. An American Psychological Association Lifetime Member, Dee is not just an advisor; she's an architect of ascendancy.

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In the realm of visionary leadership and business innovation, **Brittany Byrde** stands out as the dynamic force behind BNB Solutions LLC. As the founder of this women-owned business development firm, Brittany has woven her passion for technological advancement and strategic partnerships into a transformative journey. With an unwavering belief in the power of collaboration, she has embarked on a mission to bridge the gap between business visionaries and governmental leaders.

With a career trajectory that traces from her early days at the Washington Post to her ventures in the legal and tech industries, Brittany's diverse experiences have crafted her into an adept connector. Drawing from her extensive California network, she masterfully fuses influencers and decision-makers from government and industry, facilitating leading-edge collaborations that modernize the very fabric of cities.

At the heart of Brittany's accomplishments lies her dedication to fostering positive change. Her ability to identify opportunities for innovation and her innate skill in navigating complex government landscapes set her apart. Brittany's expertise transcends the conventional boundaries of lobbying, offering a unique perspective in procurement and deal closure that resonates with both government bodies and vendors.

One of her remarkable feats has been her instrumental role in redefining crime-solving paradigms. Through pioneering technologies such as drones and AI analytics, Brittany has not only helped law enforcement departments modernize their approach but has also significantly contributed to the revitalization of communities. Her most recent achievement can be traced to her partnership with the city of Santa Monica, where her strategies played a pivotal role in crime reduction and urban transformation.



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**Hemal Doshi** is the visionary founder and CEO of Universal EV Chargers, a pioneering company headquartered in Plano, Texas, dedicated to reshaping the electric vehicle (EV) charging landscape. With a distinguished career spanning over two decades, Hemal's journey began in electric distribution and market management in 2001. By 2008, he transitioned into the renewable energy sector, showcasing his adaptability and passion for sustainable solutions.

A graduate of the University of Florida with an MS in industrial engineering and an MBA in finance and entrepreneurship from the University of Texas at Dallas, Hemal's credentials are nothing short of impressive. His invaluable contributions to the renewable energy and EV charging sectors earned him the esteemed *Renewable Energy Award* from the Prime Minister of India.

Under the aegis of its parent company, Universal Green Group, Universal EV Chargers stands tall among its sister companies, Universal Solar, and Universal Green Developers. Together, they form a triumvirate, championing the cause of sustainable transportation. At the heart of Universal EV Chargers is a commitment to offer a comprehensive turnkey solution for EV charging infrastructure. From feasibility studies, flexible financing, and grant acquisition to state-of-the-art software solutions, Hemal ensures that his company provides an all-encompassing service.

A testament to Hemal's leadership and vision, Universal EV Chargers has successfully deployed a vast network of charging stations across the U.S., playing a pivotal role in promoting EV adoption, reducing carbon emissions, and championing a sustainable future.



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**Matt Rafalski**, the esteemed global head of enterprise sales at Genesis Global Technology, is a seasoned sales leader with over 16 years of experience in the financial services and technology sectors. Currently, Matt manages a talented team of professionals throughout the bustling hubs of London, New York, and Miami, all driven by a shared passion for innovation.

Genesis Global Technology stands at the forefront of rapid application development tailored for capital markets. With their revolutionary buy-to-build approach platform, financial institutions can now construct applications with unparalleled speed, up to 80% faster than traditional methods. In a world where the binary choice between off-the-shelf software and time-consuming internal development has limited options, Genesis offers a game-changing low-code platform that empowers developers to create resilient, high-performance, and secure applications at unmatched efficiency and scale. And, with backing from Citi, BNY Mellon, and Bank of America, they have earned the trust of esteemed entities like B3, ING, and London Clearinghouse.

One of Matt's key strengths lies in his governance, stemming from his background in leading trading desks. Armed with an MBA focused on leadership and strategy, he relishes the collaborative environment in which he works, surrounded by some of the brightest minds in the industry. The cutting-edge technology that Genesis offers excites him, and his years of financial markets and technical expertise, have honed his understanding of the urgent need for financial organizations to innovate rapidly to maintain their competitive edge.

Before becoming a driving force at Genesis, Matt spent eight successful years on Wall Street, specializing in sales and trading of commercial mortgage-backed securities and asset-backed securities. His prowess in the financial realm is evident through his numerous President's Club accolades and his possession of the FINRA Series 7 and 63 certifications.



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**Barry Raber's** ascent in the entrepreneurial world is as intriguing as it is inspirational. Incepting his first business in 1999, this seasoned entrepreneur has since been riding a wave of success, punctuated by the personal motto, "Create experiences and results that are both different and better." From Business Property Trust to Bargain Storage, and now Carefree Covered RV Storage, Barry's ventures showcase his keen insight and business acumen.

Ten pivotal years at Randall Realty under the mentorship of the magnate, Robert Randall, enriched Barry with invaluable lessons. But, as fate had it, a life-altering episode for Randall signaled a fresh beginning for Barry. Armed with knowledge and fueled by an entrepreneurial lineage, thanks to his father, Barry dove into his own venture.

His affiliation with the Entrepreneurs' Organization (EO) became a cornerstone in his journey, providing a repository of business strategies and best practices. Barry's distilled wisdom from these experiences is crystal clear: Prioritize product differentiation, engaging branding, and a customer-first culture.

Barry's latest brainchild, Carefree Covered RV Storage, is rapidly sculpting its niche in Dallas and Phoenix. The properties include unparalleled security and amenities including self-washes, charging plugs, and dog parks, as well as a homey welcome center. It is redefining the RV storage realm and receiving raving reviews from customers along the way.



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**Ben Sever** is an industry disruptor, a serial entrepreneur, and a philanthropist who has been making waves in the tech industry for a decade. A graduate of Elon University, he is continuously seeking knowledge, and has over 40 business certifications, half of which are from Ivy League institutions. He also continues to improve the world around him through philanthropy, and recently achieved his personal goal of donating \$500,000 within five years to Tampa-Based non-profits. He has founded and built over 12 companies, including the development of eRemede—an award-winning, HIPAA-compliant patient engagement platform.

Ben's expertise in developing streamlined communication systems has been a key factor in his success as he uses his two enterprise platforms, eRemede and Entourage, to change the way mobility and engagement cohesively unify progressive companies. In addition, he is the CEO of Phoenix Portfolio Partners and specializes in providing venture capital and start-up incubation to help companies grow across a wide range of industries. They are currently the only venture fund in the U.S. with company-wide Certified ScrumMaster certifications. Ben attributes his team's cultural cohesion and speed-to-market industry records to this new-age leadership style—one grounded in his passion for finding solutions that allow businesses to make better decisions faster by utilizing innovative technologies and scalable infrastructure. His goal is to give companies the tools and go-to-market strategies they need to stay profitable in any economic environment.



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**Dan Gould** has been a financial planning and wealth advisor expert for over 30 years; ever since, his entrepreneurial spirit and desire to help inspired him to start Gould Financial Group in 1991. “When I saw the mistakes my parents made, that motivated me to help others like them, but I wanted to do it my way, the way I thought people should be cared about. That’s why I started the firm,” he says. With this as his guide, he’s been breaking the mold of financial planning with a multigenerational, relationship-first approach for three decades.

Gould Financial Group is a comprehensive, full-service wealth management firm helping high-net-worth individuals, families, business owners, and professionals create multigenerational financial plans. Their team of advisors spans ages and stages of life, guiding their clients through the present and well into the future, helping with all aspects of financial planning, from mortgage rates to student loans, benefits packages to business succession, and planning, wills, trusts, and powers of attorney. “We all share our generational insights and wisdom so that our entire team has a broad view of everyone we serve,” Dan explains.

Having worked with many clients for over 25 years, Dan and his team have the privilege of seeing these relationships blossom as they see their financial goals turn from dreams to reality. “I enjoy helping people reach their goals,” he says, “and seeing my younger advisors form relationships with my clients’ kids is really cool!”



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For more than two decades, **Karen S. Evans** has been at the forefront of cybersecurity policy as she served Congressional- and Presidential-appointed positions at the U.S. Department of Energy (DOE), U.S. Department of Homeland Security (DHS), and the Office of Management and Budget. Her previous roles included federal chief information officer, chief information officer for the DHS and DOE, assistant secretary for cybersecurity, energy security and emergency response, and the national director for the U.S. cyber challenge.

In October 2021, Karen joined the Cyber Readiness Institute (CRI), an initiative that convenes business leaders from across sectors and geographic regions to share resources and knowledge that inform the development of free cybersecurity tools for small- and medium-sized businesses. “If you look at global supply chains and economic drivers of every country, these are the companies that are the engines. Yet they don’t think about building redundancy and resiliency in their security because they think no one knows them, but then they get hit with ransomware,” Karen explains. As managing director, she’s a powerful convener in establishing and driving partnerships with multiple and diverse stakeholders, successfully delivering essential private/public cyber and technology solutions. As an individual, her drive to support CRI’s mission comes from a very personal place. “Knowing that I’m making a difference for my family today and going forward in the future, that’s why I do it. I want the world to be a better place for my kids and my grandkids,” she shares.

*Karen is the recipient of a number of awards, including Baldrige Foundation Leadership Excellence in Cybersecurity, Leading Data Consultants in North America 2022, and Golden Gov: Executive of the Year 2020.*

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#### **SMS Integration:**

Conveniently communicates with leads through SMS text messages, a medium with high open and read rates compared to emails



#### **Labor Cost Savings:**

Significant reduction in operational costs as there's no need to hire round-the-clock sales or customer support teams



#### **Adaptive Learning:**

Our bot learns and adapts, ensuring that it's always improving its interactions and increasing its conversion rates



#### **Revitalize Lost Opportunities:**

Actively re-engages with old leads, giving your business another shot at conversions you might have missed previously



#### **Multitasking Capability:**

Can simultaneously engage with multiple leads, ensuring maximum reach and efficiency

**TAKE CHAT CHARLIE FOR A TEST DRIVE**

<https://chatcharlie.ai>

LET CHAT CHARLIE FILL YOUR CALENDAR BY BOOKING YOUR MEETINGS WITH NEW LEADS OR RE-ENGAGING WITH OLD LEADS





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