



Big Idea

CONNECTpreneur

SUMMER FORUM

June 30, 2016

Falls Church Marriott Fairview Park



TECH 2000

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459 Herndon Parkway, Suite 8
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Big Idea CONNECTpreneur Summer Forum



AGENDA

07:00 – 08:15 am	REGISTRATION / NETWORKING																								
08:15 – 08:20 am	WELCOME S. TIEN WONG , Chairman, Tech 2000 and Lore Systems																								
08:25 – 09:10 am	FIRESIDE CHAT RICK RUDMAN , CEO of Tracx; Founder and CEO of Vocus (NASDAQ; VOCS)																								
COMPANY SHOWCASE																									
9:10 – 10:00 am	<table border="1"> <thead> <tr> <th>COMPANY</th> <th>PRESENTER</th> <th>TITLE</th> </tr> </thead> <tbody> <tr> <td>ANEXIO</td> <td>Tony Pompliano</td> <td>President & CEO</td> </tr> <tr> <td>AppTek</td> <td>Adam Sutherland</td> <td>Chief Executive Officer</td> </tr> <tr> <td>iThrivePH</td> <td>Marc Isaacson</td> <td>Chief Executive Officer</td> </tr> <tr> <td>Legal Decoder</td> <td>Joe Tiano</td> <td>Chief Executive Officer</td> </tr> <tr> <td>PayKii</td> <td>Nelson Irizarry</td> <td>Chief Operating Officer</td> </tr> <tr> <td>Zoobean</td> <td>Felix Brandon Lloyd</td> <td>President & Chief Dad</td> </tr> <tr> <td>5AM Solutions</td> <td>Earl Furfine</td> <td>Chief Executive Officer</td> </tr> </tbody> </table>	COMPANY	PRESENTER	TITLE	ANEXIO	Tony Pompliano	President & CEO	AppTek	Adam Sutherland	Chief Executive Officer	iThrivePH	Marc Isaacson	Chief Executive Officer	Legal Decoder	Joe Tiano	Chief Executive Officer	PayKii	Nelson Irizarry	Chief Operating Officer	Zoobean	Felix Brandon Lloyd	President & Chief Dad	5AM Solutions	Earl Furfine	Chief Executive Officer
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10:00 – 10:45 am	ALL-STAR VC PANEL: WHAT'S REALLY GOING ON IN VENTURE CAPITAL Moderator: HANK TORBERT , Principal and Co-founder, RLMcCall Capital Partners JACK BIDDLE , General Partner, Novak Biddle Venture Partners ANDY JONES , Managing Director, Maryland Venture Fund APRIL YOUNG , Managing Director, Hercules Technology Growth Capital, Partner, CM Equity Partners																								
10:45 am	NETWORKING																								

Join the conversation: @connectpreneur and #connectpreneur
Next CONNECTpreneur Forum: September 28, Bethesda, MD

SPEAKERS



RICK RUDMAN, CEO OF TRACX; FOUNDER AND CEO OF VOCUS (NASDAQ:VOCS) @tracxceo

Rick Rudman is a seasoned software CEO and an early pioneer in cloud-based subscription software. He has a proven track record of success leading both public and private growth software companies, with experience as an entrepreneur, public company CEO and board member.

Rick is currently Chairman and CEO of Tracx, the leading social business cloud for building brands, driving new business and improving customer experience in the new social economy.

From 1992 through 2014 Rick was Chairman and CEO of Vocus (NASDAQ:VOCS), a leading provider of marketing and PR software. Under Rick's leadership, Vocus achieved over twenty years of 36% average annual growth, growing revenue from under \$1M to over \$180M, with over 1,500 employees in the US, Europe and Asia. Rick led the company through multiple rounds of venture financing, an IPO and 32 quarters as a public company before achieving a 50% premium for investors when Vocus was acquired in 2014 in an all cash transaction valued at half a billion dollars.

Rick began his career in the United States Air Force, enlisting after high school and attending the USAF Technical Training School for certifications in electronics, satellite communications and computers. He served in the U.S. and Germany in the 601st ASOC, a mobile close air combat support unit. During his four year tour he received multiple medals and four promotions through the rank of Sergeant.

Rick has served on the board of directors for multiple technology companies and was also Vice Chairman of the Baltimore Symphony Orchestra.

Rick received his Bachelor of Science degree in accounting from University of Maryland, and became a Certified Public Accountant in 1990. In 2003 Rick was selected as Ernst and Young's Entrepreneur of the Year in the software category for the Washington, D.C. region, and in 1999 was named the High Tech Council of Maryland's Entrepreneur of the Year.



S. TIEN WONG, CHAIRMAN, TECH 2000 INC, AND LORE SYSTEMS @tienwong (Snapchat and IG: stienwong)

Tien is Chairman of Tech 2000, a Northern Virginia based leader in technology training, mobile e-learning, and mobile content management platforms. He is also Chairman of Lore Systems, a provider of network engineering, cloud computing, and VCIO services.

In 1991, Tien co-founded and served as CEO of CyberRep, Inc. until its acquisition in 2003 by Affiliated Computer Services. CyberRep was one of the largest privately held CRM outsourcing companies in the world with over 2,300 employees and \$80 million in revenue. Today, the CyberRep/ACS business unit is one of the world's largest call center operations, with over \$2 billion in revenue as a division of Xerox Corp. CyberRep was ranked for 4 consecutive years in INC. magazine's "Inc. 500" as one of the fastest growing private companies in the USA. CyberRep was

SPEAKERS

profitable for 11 straight years and was backed by Allied Capital Corporation.

Tien is a recognized international expert in CRM, direct marketing, and BPO, having presented at dozens of industry events around the world, and written numerous articles on the CRM and BPO spaces. He has provided industry commentary on the ABC, Fox, NBC, CNBC, Maryland Public Television, and China's CCTV networks, as well as Time Magazine, The Washington Post, Inc. Magazine, and Success Magazine. He serves on several boards including the CIT GAP Fund's Investment Advisory Board, the Digital DC Tech Fund Investment Advisory Board, the Potomac Officer's Club and FounderCorps. He was appointed by Governor Martin O'Mally to the 9-member Maryland Venture Fund Authority which allocates and manages \$84 million of capital which is invested into top tier venture funds. He is an Entrepreneur in Residence at Georgetown University's McDonough School of Business, and a graduate of Dartmouth College.



HANK TORBERT, PRINCIPAL AND CO-FOUNDER, RLMCCALL CAPITAL PARTNERS @hltorbert

Mr. Torbert is a Principal and Co-Founder at RLMcCall Capital Partners, a private equity firm focused on industrial, media, technology and special situations transactions. Mr. Torbert has spent the last 20 years in the venture capital, private equity, operational management, business development and corporate finance world.

As a founding investor and board member, Mr. Torbert played an integral role in the launch, development and \$100MM IPO of Mood Media (TSX: "MM"), an internet-based music services company. He also played a vital role in the formation and growth of Midas Medici (OTB: "MMED"), and orchestrated the acquisition of Direct Air and Swift Air, serving as Chairman of Swift Air, a passenger and cargo charter airline that was spun out of Swift Transportation.

From 2004 to 2006, Mr. Torbert was COO of Broadcast Capital, focused on media and broadcasting investments. From 1999 to 2004, Mr. Torbert was VP of the Financial Sponsor Group at JPMorgan Chase, where he covered top tier middle market private equity clients and completed over \$100 billion in transactions in media and telecom. He was previously at AIG, where raised capital for the firm's \$1 billion Global Emerging Markets Fund.

Mr. Torbert is an Entrepreneur-in-Residence at Georgetown's McDonough School of Business and the New Orleans'-based IdeaVillage's IDEAx and CAPITALx programs. He is a recipient of the Network Journal's Top 40 Under 40 Award, and serves on the boards of Cultural DC and the New Orleans' Contemporary Arts Center. Mr. Torbert holds a B.A., a masters degree in International Finance and an MBA, all from Columbia University. Mr. Torbert is also an alumnus and Trustee of the Taft School. He enjoys collecting mid-century and contemporary art, hunting and fishing.

SPEAKERS



JACK BIDDLE, GENERAL PARTNER, NOVAK BIDDLE VENTURE PARTNERS

Prior to co-founding NBVP in 1996, Jack was President and CEO of InterCAP, a VC-backed computer graphics software company. InterCAP was acquired by Intergraph in 1995. From 1987 to 1990, Jack rose from Senior Associate to Partner at Vanguard Atlantic, a merchant banking group focused on M&A advisory work and control investments in software companies. At VAL, he served as turnaround CEO of a software company and then as COO of an application software company. Earlier, he was an IT Industry Generalist, focused on Telecommunications Technology at the Gartner Group, and also Executive Assistant to CEO Gideon Gartner. He began his career in 1983 in Austin, Texas, at Business Development Partners, an early stage venture capital partnership. Jack holds a BA in Economics from the University of Virginia.

Jack serves on the Boards of WealthEngine, Adwerx, Orchestro (Chairman), Triumfant, ReverbNation, Shoeboxed, Princeton Optronics and Appian Corporation. Past Board or Observer seats include SafeView (acquired by L3 Communications), Matrics (acquired by Symbol Technologies), Giga Information Group (NASDAQ: GIGX), Telogy (acquired by Texas Instruments), Tantivy (acquired by Interdigital), Paratek (acquired by Blackberry), CorasWorks (acquired by Human Touch), Starfish Retention Solutions, (acquired by Hobsons), Appfluent (acquired by Attunity) and Blackboard.

Jack is a member of Business Executives for National Security (BENS), and advises the U.S. Department of Defense on technology and innovation. He has served on the Investment Committee of New Markets Growth Fund. Jack is a Director and former Vice Chairman of the Board of the Baltimore Symphony Orchestra, and Treasurer and Finance Committee Chair of the Sibley Memorial Hospital Foundation. He has also served on the Board of Directors of TIE DC.

Jack has been named multiple times as one of Washingtonian Magazine's 'Tech Titans', as well as to the Washington Business Journal's Power 100 list of the region's most influential business leaders.



ANDY JONES, MANAGING DIRECTOR, MARYLAND VENTURE FUND

Andy Jones has a nearly 30 year business career with a proven track record of building and growing businesses and creating shareholder value. He has a unique blend of operational and investment success, having worked on "both sides of the fence" as an Operating Executive and an Investor/Board Member. Born and raised in Maryland, he has spent most of his business career operating in Maryland. An entrepreneur at heart, he connects with those that the Maryland Venture Fund invests in and supports because he has "been in their shoes".

Andy spent 15 years in the venture capital business here locally, starting in the mid-1990s with Frank Adams (former TEDCO chair) and Grotech Ventures. Recognizing a local market need for early stage capital and also feeding his first entrepreneurial "itch", Andy left Grotech in 1999 to raise an institutional fund with peers in the venture business. They successfully raised an \$85

SPEAKERS

million 1st institutional fund and the mid-Atlantic office of Boulder Ventures was born. After 3 successful funds with Boulder and just under \$300 million raised and deployed into early stage technology and life science ventures, Andy got the entrepreneurial itch again to do another start-up, High Street Partners.

Andy helped turn High Street into a VC-backed (3 rounds), SaaS company with \$42 million in recurring revenue and a successful \$100 million exit to a European buyer.

Prior to joining the Maryland Venture Fund, Andy was recruited to run M&A in North America for a \$4 billion market cap public company in Europe named Kingspan. Kingspan is the market leader in energy efficient building envelope solutions. Andy consummated the first ever public acquisition for Kingspan, a \$400 million deal in Toronto that achieved significant press and put Kingspan on the map across Canada. Andy completed a few other smaller acquisitions for Kingspan and one divestiture, but was attracted to the Maryland Venture Fund so he could pursue his passion which is financing and growing privately held businesses.

Andy received his Masters of Business Administration with a specialization in Finance from the University of Chicago Booth School of Business in 1990. He received his Master of Engineering degree from Cornell University in 1986 and Bachelor of Science from Cornell in 1985, where he studied computer science and majored in electrical engineering.



APRIL YOUNG, MANAGING DIRECTOR, HERCULES TECHNOLOGY GROWTH CAPITAL

Young joined Hercules in 2011 as Managing Director and is based in the company's McLean, VA offices. Hercules is the leading specialty finance company focused on providing senior secured loans to venture capital-backed companies in technology-related markets, including technology, biotechnology, life science and cleantech industries at all stages of development. April brings more than 15 of venture banking experience to her current role, having previously served as Senior Vice President and Managing Director, US for MMVF, a Toronto-based venture debt fund, responsible for developing and implementing that company's expansion strategy in the United States.

Prior to joining MMV, April was with Comerica Bank for 10 years as Senior Vice President and Managing Director of the Mid-Atlantic Technology and Life Sciences Division. Earlier in her career, April was Executive Director of the Potomac KnowledgeWay Project, and Senior Fellow for Regional Economic Development at George Mason University's Institute for Public Policy. Prior to that, April was Director of the Virginia Department of Economic Development and also served as Executive Director of the Fairfax County Economic Development Authority during the period when Northern Virginia emerged as a global technology center.

April holds a Ph.D. in Public Policy and Administration from Saint Louis University and a B.A. and a Masters in Urban and Regional Planning from The George Washington University. She

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has served as director of many professional organizations including the International Economic Development Council, Mid-Atlantic Venture Association, the Florida Venture Forum, the Association for Corporate Growth, and Greater Philadelphia's PACT. She is a co-founder of Mindshare, an exclusive, invitation-only program for CEOs that for nearly 20 years has provided mentoring, a sense of community and a spirit of innovation in the region to some of the region's hottest early stage companies. April is also Chairman Emeritus of the Board of Five Talents International, a Christian micro-finance organization as well as Chair of the Audit Committee of Goodwill of Greater Washington. April has received numerous honors for her involvement in the tech community, including Lifetime Achievement Awards from the Northern Virginia Technology Association and Women in Technology. She has been named to the Washingtonian's list of 100 most powerful women as well as a Tech Titan.

CONFIDENTIAL EXECUTIVE SUMMARY



ANEXIO TECHNOLOGY SERVICES, INC.

INTRODUCTION AND COMPANY OVERVIEW

ANEXIO Technology Services, Inc. (the "Company") was founded in 2013 and is focused on executing a consolidation strategy within the Cloud/Managed IT Services industry. With a consolidated revenue target of \$300m within 48-60 months, the Company is seeking to secure a financial partner to accelerate its acquisition of accretive data center centric solution providers. ANEXIO has completed 3 acquisitions and has increased revenue from \$1.3m in 2013 to \$3.9m in 2015, and is currently on a \$15m annual revenue run rate, generating \$3m+ in EBITDA.

MANAGED IT & DATA CENTER CENTRIC SOLUTIONS

- COLOCATION
- INFRASTRUCTURE AS A SERVICE (IAAS)
- MANAGED SERVICES
- CUSTOMER PREMISE SOLUTIONS
- CLOUD SERVICES

MID-MARKET ENTERPRISE FOCUSED – HIGHLY REGULATED VERTICALS

THE OPPORTUNITY – A FAST GROWING MARKET

A properly executed consolidation of strategically assembled assets, distinguished by geographic coverage, technical domain expertise, vertical market traction, and a stable customer base, can achieve substantial returns for investors with an attractive risk profile. These returns would be accomplished by exploiting the overall market growth as well as leveraging several advantages afforded by scale.

Managing Mission Critical Infrastructure

INDUSTRY CONSOLIDATION:

IT/ Cloud Services is a highly fragmented industry experiencing significant growth. ANEXIO is consolidating regionally focused Data Centers and MSPs, creating scale and improving financial performance by extracting synergies and crossing selling services into acquired customer bases.

ANEXIO currently services 120 customers, across highly regulated industries with a combination of data center solutions (5 data center locations) and customer premise solutions

An investment in the Company represents an opportunity to partner with a deeply experienced management team to build a large scale Cloud/ IT Services eco-system through the consolidation of small to medium-sized businesses.

CONTACT INFORMATION:

Tony Pompliano, CEO
ANEXIO Technology Services, Inc.
(919) 607-2055
tony@anexio.com

ANEXIO

- Managed IT & Data Center Solutions
- HQ Raleigh, NC
- Help Desk/ NOC Sarasota, FL
- Data Centers – Ashburn, Reston VA & NY Metro
- Serving SMB, Enterprise Clients East Coast

Mid-Market focused, Consultative approach transitioning legacy IT infrastructure to Cloud alternative solutions

AWARDS

- MSPmentor 501 2015 EDITION
- Inc. 500 AMERICA'S FASTEST-GROWING PRIVATE COMPANIES
- CRN TECH ELITE 250
- MSPAlliance Accredited MSP

Building an IT-Ecosystem



CLOUD SOLUTIONS



MANAGED SERVICES



COLOCATION



SECURITY AND COMPLIANCE



MOBILITY SOLUTIONS





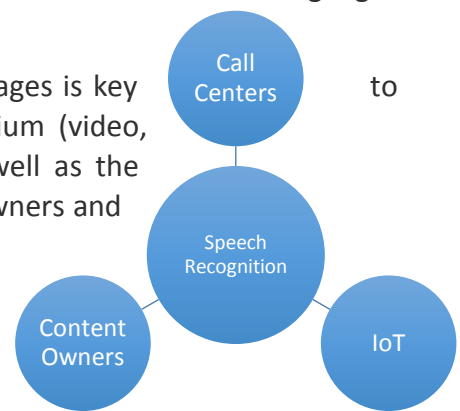
Company Profile

Applications Technology (AppTek) is the leading independent speech recognition company that has been delivering the most technically advanced applications for over 20 years. By converting spoken language into text, AppTek makes audio and video assets: Searchable, discoverable, analyze-able and significantly more valuable.

AppTek licenses its comprehensive suite of Automated Speech Recognition (ASR) and Hybrid Machine Translation (HMT) products and solutions to enable major commercial and government customers to process audio, video, and text content in more than 30 languages and dialects.

Automating speech recognition and translation of human languages is key making information globally accessible, regardless of the medium (video, Internet, mobile, etc.). We focus on several industries as well as the government sector: Telephony (Call Centers), Media (Content Owners and Distributors), and IoT (Intelligent Interfaces).

AppTek is one of the original pioneers in ASR and HMT, and our technical talent has extensive computational linguistics experience in speech recognition, computational linguistics and machine translation. These key employees are instrumental to our continued success and contribute to AppTek's ability to innovate and upgrade our solutions.



Speech is Big Data

Audio and video represent a huge proportion of all unstructured data. AppTek's solutions transcribe, translate and analyze audio and video – unlocking the value of these assets.

Speech is Intuitive

Consumers seek voice-based mobile solutions that allow them to simply and effectively navigate, retrieve and transact across a growing universe of content and services in mobile phones, automobiles and personal navigation devices. Since most people can talk more quickly than they can type, speech-based technologies are a natural solution to these problems.

Speech is Global

AppTek has a distinguished commercial client base across North America, Europe, MENA and Asia. The international reach of our products reflects the universal need for Speech Technology as well as the breadth of our language coverage.

Executive Summary

iThrivePH
Marc Isaacson

5415 W. Cedar Lane, Bethesda, MD 20814 | www.myvillagegreen.com | www.iqyouhealth.com
610-453-9079 | Fax: 301-493-4671 | marc@myvillagegreen.com

Management:

President/CEO: Marc Isaacson
VP Sales/Marketing/Dev: Dan Gay
Controller: Bonnie Proch
Medical Officer: Dr. Joseph Pizzorno
Medical Advisor: Dr. Rav Ivker

Industry: *Healthcare Services*

Number of Employees: 50

Bank: *Sandy Spring*

Auditor: *Cohn Reznick, LLP*

Law Firm: *Carr, Morris & Graeff, P.C.*

Amount of Financing Sought:

\$2,500,000

Round Timing: Summer 2016

Current Investors: *Angels, Friends & Family*

Use of Funds: *\$950K Marketing, \$250K Staff, \$700K Software, \$200K Inventory, \$400K Working Capital.*

Business Description: Personalized Health Guidance Smart Tool

Studies show approximately 70% of future disease and chronic conditions are preventable by addressing physiological dysfunctions, nutrient deficiencies, diet and lifestyle. Consumers look to personalized software apps and alternative nutraceutical providers for solutions to their health-related issues.

After 13 years of product development and a \$5 million investment, iThrivePH is ready to launch IQYOU, an online personalized wellness solution. IQYOU is a cloud-based platform that will redefine how consumers manage their health, as well as how clinicians will practice. IQYOU will simplify the complexities of managing personal health.

Company Background: Established in 1965, Village Green Apothecary (VGA), a leading U.S. custom nutrient lab, integrative pharmacy and online business, has long been a solution for traditional and integrative care. Marc Isaacson acquired VGA 13 years ago and created iThrivePH as an umbrella company to position for new growth. In 2011, iThrivePH acquired Sinus Survival. In 2012, VGA created the Sinus Survival Solution Center, which was the first condition-specific, personalized health program. The company, with current revenue of \$8 million, is positioned for breakout growth. iThrivePH with a team of 50, owns IQYOU, Sinus Survival and Village Green Apothecary.

Management: Marc Isaacson acquired VGA 13 years ago and expanded the business to iThrivePH. Dr. Joe Pizzorno is one of the world's leading authorities on science-based natural medicine; he founded Bastyr University, and is the author of *The Encyclopedia of Natural Medicine*. Dan Gay, CMO, facilitated the Sinus Survival acquisition and has held executive posts at Qwest, MCI and others. Bonnie Proch, Controller, has held leadership positions at Deloitte & Touche, and in healthcare and biotech.

Product Features and Benefits: Over 30,000 medical studies (300,000+ reviewed) map IQYOU's personalized health plans through a proprietary, scientifically-based system. Results can be further narrowed through more than 200 affiliated lab tests, along with a ground-breaking new DNA Genomics Technology.

Combining medical research, health history, DNA genomics, lab results, prescriptions, diet, and lifestyle enables IQYOU to generate a comprehensive "daily whole health plan," providing both users and their doctors access to specific methods for maximizing wellness.

The Market: The \$34B nutritional supplement market is growing at 7% annually. The mobile health market is expected to grow to \$59B by 2020. The \$20B premium app segment grew by 100% last year. IQYOU's premium service will capitalize on this trend.

Multiple Revenue Streams: IQYOU offers multiple revenue streams, including monthly consumer premium subscription fees (the "FitBit model") and customized supplement deliveries. Supplement formulations are developed based on the clinical studies embedded in IQYOU. Additional recurring revenue streams also include: product advertising, physician fees, lab tests, and more. IQYOU will utilize a proven condition-specific marketing used for the Sinus Survival platform, which generated 4x emails and a 50% revenue uplift in 9 months.

Competition: IQYOU is the first whole-health platform to the marketplace. Under Armor spent almost a billion dollars in acquisitions in the workout space over 18 months, Fitbit and others are growing rapidly. 23andme.com and Ancestry.com are the first economical DNA tests to the market, without a personal guidance program (IQYOU is able to download DNA content to profile).

Private Funding Plan: iThrivePH is seeking \$2,500,000 in private funding. Proceeds will be used to add new condition-specific sequences, launch IQYOU's online platform, develop client engagement experiences, and complete the current integration for DNA gene SNP mapping.

Financial Projections (unaudited):	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue:	\$11,185	\$19,071	\$34,798	\$61,957	\$95,218
EBIT:	(265K)	2,707	10,140	23,268	40,950
(dollars in thousands)					

MANAGEMENT TEAM:

Joseph R. Tiano, Jr.,
 Founder and CEO
 (Former Partner at two AmLaw
 100 law firms)

Christopher J. Miller,
 Co-Founder, CTO and COO

Brian Wilson
 Vice President - Technology

Jason Chi
 General Manager - Product

INDUSTRY:

LegalTech, SaaS, Legal Spend
 Data Analytics

KEY FINANCIAL METRICS:

- 2015 Revenue: \$138K
- 2016 Bookings (YTD): \$155K
- Founder funding: \$60K (2014)
- F&F round: \$750K (10/2014)
- Subscription/licensing fees (avg. deal size \$34K annual)

USE OF PROCEEDS:

- Sales and marketing
- Product and system enhancement
- Recruiting
- Cash flow positive 17 months from \$2.2 million financing

CONTACT INFORMATION:

105 N. Virginia Avenue
 Suite 204
 Falls Church, Virginia 22046
 703.237.1313 (office)
jtiano@legaldecoder.com
www.legaldecoder.com

Our Business. Our LSA technology analyzes complex legal spend data and empowers clients and law firms to get greater predictability, transparency, efficiency and value when it comes to legal services. We are redefining and standardizing that way that legal services are priced and economically evaluated and empowering legal industry decision makers to make better, data driven decisions.

Cost Control and Pricing Predictability are THE Priorities. Over the past decade, the legal industry’s foundation has been eroding. Technological advances, alternative service providers, a supply/demand mismatch for legal services and client costs concerns have destabilized the industry’s infrastructure. Now, the legal industry’s historic economic model is broken. Clients do not really know what they should be paying for legal services and law firms do not really know what they should be charging. Both sides crave predictability, transparency, efficiency and value and neither side likes cost/pricing uncertainty. In the \$400 billion legal industry, the magnitude of pricing uncertainty is \$50-60 billion annually.

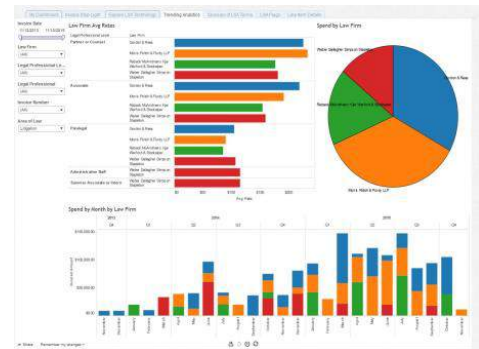
Our Solution. LSA technology ingests and analyzes billing and invoice data, line item by line item, evaluating whether the “right” task was handled by the “right” legal professional in the “right” amount of time. Staffing inefficiencies, workflow inefficiencies and poor billing practices, which pose challenges for clients and law firms alike, are surfaced in an actionable way. Our technological differentiator is “built-in” legal industry domain expertise which intelligently analyzes data, instead of simply re-packaging data in a report that a user must analyze. Our solution automates the hard work, arming legal industry constituents with KPIs to drive cost control and optimize pricing certainty.

Market Positioning and Opportunity. Our technology has industry-wide applicability solving the challenges of clients and law firms either as a “stand alone” solution or a “plug in” amplifying other technology platforms. The LegalTech industry is a \$3.0 billion market and projected to reach over \$9.0 billion by 2019. Corporate sector clients with annual revenues up to \$7.5 billion and outside counsel spend ranging from \$1.5 to \$15.0 million have been our initial target market and are 40% of the overall market. Since our commercial launch in early 2015, 18 clients in this initial target market segment have engaged us. As we continue to penetrate this segment, we are expanding our market outreach to larger corporate clients (including via channel partnerships), law firms and government agencies.

Competition. Competitors include legal bill auditors and law industry consultants who use non-scalable, manual processes and legacy e-billing and LegalTech software companies whose outdated technology cannot meet current market demands. Our competitive advantage is a solution that automates a time-consuming, highly complex analysis with technology that actually analyzes, not just regurgitates, data.

Our Revenue Model. We generate revenue by licensing our LSA technology as a SaaS application. Corporate sector clients in our initial target market choose from three SaaS offerings: subscription, hybrid (retrospective analysis plus subscription) and a retrospective data analysis. Average annual contract value for our subscription/hybrid clients is \$34,000 (approximately 0.8% of the dollar value of the data analyzed) and, as we grow, scale and enter other markets, pricing and ACV will be in the low to mid six figures.

Marketing and Sales Strategy. We use direct marketing efforts, content marketing and thought leadership campaigns and leverage industry associations to reach our prospects. Future sales will be handled by a combination of inside and outside sales teams aiming for a 10% conversion rate and 7-9 month sales cycle.



Representative Customers:



Year ended June 30	2017	2018	2019	2020
Revenue	\$719,800	\$4,678,901	\$11,240,017	\$18,016,375
Expenses	\$1,862,451	\$2,894,596	\$4,650,016	\$6,382,202
Net Income	(\$1,142,651)	\$1,784,306	\$6,590,001	\$11,634,173

Raise US\$ 1.5 Million Equity Funding



www.paykii.com

Industry: FinTech B2B

Employees: 7

Founded: Feb 27, 2015

Washington, DC

Monterrey, Mexico

Contact

Nelson Irizarry

Nelson.irizarry@paykii.com

+1 (703) 587-2717

Capital

Founders: \$100,000

F&F: \$270,000 (Sept '15)

Mgmt & Founders

Fabian Saide, CEO

Nelson Irizarry, COO

Daniel Barragan, CTO

Advisors

Elias Ghanem

Manuel Orozco

Alberto Laureano

Summary. PayKii enables individuals living abroad to pay expenses for their family back home by connecting money transfer operators and financial institutions with billers around the world

Problem. The unfortunate reality is gross financial mismanagement occurs when individuals send cash home. Our solution provides individuals with greater control over spending and better visibility into major expenses. Almost half of individuals sending money would directly pay expenses back home, but global money transfer networks are designed for sending cash.

Solution. PayKii provides the operational plumbing that facilitates global bill payment. Our global B2B hub makes it easy for money transmitters through one single connection to offer individuals secure, simple and convenient 24/7 access to thousands of billers around world.

Value Proposition. For money transmitters, our cross border bill payment solution complements their core cash remittance product, deepens customer engagement and leads to a stickier customer relationship. Our solution accelerates time-to-market without the costs, challenges and distractions associated with building an in-house solution.

Opportunity. Remittances to developing markets are forecasted to reach \$500 billion in 2018. Over 20% of remittance volume (~\$100 billion) is spent on bill payment. This excludes payment opportunities in adjacent categories such as education, healthcare, financing and government.

Customers: PayKii live with Xoom, a top 5 U.S. remittance provider and the pioneer in online digital remittances. PayPal acquired Xoom in November 2015 opening the door to opportunities with PayPal's broader customer base. Initiating our broader direct sales efforts in 2016, we have built a robust sales pipeline in only a few months with multiple client wins since January, including Money Transfer Operators in and outside the U.S.

Milestones.	2015	1H2016 Target	2H2016 Target
Market Coverage	Connections with 6 countries	Live connections with 10 countries	Live connections with 20+ countries, including China
Customers	Xoom (a PayPal Company)	Xoom launch plus sign at least 2 additional clients	Sign 3+ additional top tier clients
Product & Operations	Built technology platform	Solidify customer organization (i.e., operational execution)	Speed customer integrations & enhance organizational talent

Business Model. Fee-based per transaction pricing model.

Management. Our founding team brings more than 35 years of experience in global payments and financial inclusion combined with an entrepreneurial track record of success in both developed and emerging markets.

Competitors. Our direct competitor - Regalii - has pivoted multiple times over 4 years before settling on an approach similar to ours. Regalii offers bill payment to 10 countries and promotes its presence in media. Future competitors may come from companies in adjacent spaces, such as international airtime top-up.

What Sets Us Apart.

- Exclusive functionality in select markets
- Business model designed for global reach
- Expand beyond basic utility bills, such as insurance

Use of Funds. Capital will be used to accelerate market expansion, continue integrations and solidify the organizational infrastructure with a specific emphasis on sales, operations, customer service and platform development.

	2015A	2016	2017	2018	2019	2020	
Financials (US\$ thousands)	Revenues	\$0.01	\$0.2	\$4.3	\$12.6	\$19.8	\$26.1
	EBITDA	\$(0.16)	\$(0.7)	\$0.3	\$3.2	\$6.0	\$7.9
	Transactions	--	0.3	7.3	22.1	36.4	50.1

Zoobean, Inc.

Executive Summary

Company Name

Zoobean, Inc.

URL: www.beanstack.org

Industry: Internet, K-12,
Public Libraries

Employees: 6

Founded: 05/2013

Legal Structure: C-Corp

Financing to Date: \$1.8M

Financing Plan:

Convertible Note

Cap: \$4M

Discount: 20%

Maturity: 24 mos.

Round Size: \$250K

Target Close: July '16

Development Stage

Company gained \$75K in sales in 2014 and \$380K in 2015. As of May 2016, the company's run rate is \$705K. It has raised \$1.8M in outside capital including from Mark Cuban, Kapor Capital, Militello Capital, the Dingman Center Angels with Hilton Augustine, Jr., and the Center for Innovation Technology.



COMPANY OVERVIEW

Zoobean provides the single most useful platform for facilitating reading programs and book clubs for any organization. Its delightful, mobile-optimized solutions specifically helps schools and libraries more effectively engage young readers and their families, increasing the number of visitors and materials in circulation—important factors on which their funding relies.

In less than 18 months, Zoobean has gone from 0 clients to over 140. It has quadrupled its client base over just the last year and had over \$350K in sales bookings during Q1.

MANAGEMENT TEAM

Felix Brandon Lloyd (Chief Dad and Executive Officer): Felix, a serial entrepreneur and educator, co-founded Zoobean. He is a former Washington, DC, teacher of the year and took his previous company, Skill, Life. Inc., to a successful exit with BancVue, Ltd.

Jordan Bookey (Chief Mom and Creative Officer): Jordan, a former teacher and nonprofit director, served as Google's first Head of K-12 Education Outreach and was recently named one of The Wharton School's first class of 40 under 40.

Tyler Ewing (Development Director): Tyler is a full stack developer with a background in systems operations. He previously co-founded tech company Game Huddle, Inc. with Jonathan Carson and earned his BS in Information Science from the University of Pittsburgh.

PRODUCT/SOLUTION

Zoobean's flagship product, called Beanstack: Reader 365, provides each library with a web application that sends local families a personalized recommendation of a book each week. It further provides a reader dashboard through which users can keep track of their reading and earn badges or other incentives. The company has also introduced a version of Beanstack that enables PK-12 school libraries to conduct reading programs with a particular focus on encouraging collaboration between teachers, parents, and the school library.

MARKET

There are over 9,000 public library systems, which spend \$263M a year on electronic resources. Based on existing sales, the total addressable public library market for Zoobean's current Beanstack product is \$55M. With over 17,000 private schools and 81,000 public school libraries, a similar bottom-up analysis estimates the K-12 market for the current product to be \$164M. The total market for digital services sold to libraries and schools is over \$3B.

FINANCIAL HISTORY & FORECAST:

	2013	2014	2015	2016	2017
Revenue	31,764	\$78,614	\$353,401	\$1,058,221	\$2,707,606
EBITDA	-\$250,293	-\$536,545	-\$508,888	-\$430,538	\$322,076

USE OF FUNDS

Zoobean plans to use the investment to reach cash flow breakeven by Q3 2017. The company intends to complete a Series A financing round after reaching profitability and demonstrating ongoing growth in the public library and K-12 markets.

Based on information available regarding comparable acquisitions, today's market will likely support exit multiples of 8-10x EBITDA, or 2-3x revenues. It is likely that investors in this round will realize at minimum a 3-4x return and more likely a 6x-10x return.



www.5amsolutions.com
www.5amsunrise.com



1700 Rockville Pike, Suite 270
Rockville, MD 20854
866-526-6042

Management:

Earl M. Furfine – CEO
Brent Gentleman – Founder
Will FitzHugh – CSO
Shilpa Gorfine – SVP Operations
and Finance

References/Advisors:

Sidney Fuchs, President and CEO
MacAulay-Brown
David Fenstermacher Vice
President R&D Bioinformatics at
MedImmune
Craig Lipset, Head of Clinical
Innovation, Pfizer

Company:

Industry: Life Science/Healthcare
Founded: May 2005
Legal Structure: C-Corp

Current Major Customers:

MedImmune/Astra Zeneca,
Pfizer, Thermo-Fisher,
Bio-Rad

Business Description: 5AM is a provider of cloud-based solutions for life sciences and healthcare. For 13 years, 5AM has been a software product developer and system integrator for life science and healthcare customers who were early adopters and providers of genomic technologies. We have offered customers unique methods for leveraging genomics to address the data challenges of integrating personalized medicine into all sectors of health care. Our consulting services and proprietary tools facilitate:

- Integration of data from disparate information systems to target therapies
- Leveraging virtually unlimited external data sources to drive drug discovery
- Exceptionally strong management of big data, especially genetic data
- Collaborations and partnerships that involve sharing proprietary data
- Privacy protections for patients' information

Business Model: Our executive team spent 6 months in 2015 visiting current and prospective clients and discovered some of the greatest and continually growing challenges for Pharma, Hospitals, Universities and Biotechnology firms:

- “Our data scientists **have no time to analyze data** because they spend all their time fixing and manually integrating data.”
- “We’re capturing medical, trial and observational data from the same patients and **still can’t mine the combined data** because they’re in different systems.”
- “I have electronic medical records but **no good way to assemble patient cohorts** for research studies.”
- “We’re **overwhelmed by the volume, complexity and noisiness** of genomic and medical data.”

To address these needs, 5AM created 5AM Sunrise, a unique platform that allows organizations to clean, analyze, and visualize genomic, clinical trial and observational data.

Market: The market for Life Science, Healthcare and Biotechnology software supporting precision medicine is in the billions. The need to curate data as well as repurpose old data will continue to grow exponentially. Precision Medicine will drown the current capability of organizations to incorporate genetic data and clinical trial data. Adding observational data on patients using mobile and wearable technologies and the environment we live in will only exacerbate this issue. 5AM is the first company to provide self-serve data curation/analytics and observational data collection that is combined with genomic sequencing data. This is a primary and necessary step for the success of precision medicine.

Competition: 5AM is in a unique position with respect to the competition. The precision medicine market is hot, highly competitive and dispersed. Being able to envision and deliver innovation is uncommon. The ingredients include domain expertise, proper planning and controls, software excellence, and reputation. Competition includes Accenture, Deloitte, IBM, Google, InfoSys and Persistent Systems, Genospace, Syapse, Tamr, Horton Works, MediData and Quintiles IMS. Our advantage includes our engagement model of embedded domain experts, our 13 year track record, and our customer funded product development model by a top 5 Pharma company who will license the product and help sell it to their competition to avoid sponsoring the whole cost to achieve the necessary results. This is the model that MediData used to advance their products and dramatically impact the revenue and value of their company from less than \$10mm to over \$300m today. Our primary limitation is our ability to staff large projects quickly.

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TECH 2000, INC @tech2000inc

Tech 2000 is an award-winning EdTech and mobile content management software company. We are seriously committed to pushing the limits of technology and innovation to improve the learning experience for learners and support those that are involved in education. Tech 2000 has developed and patented mobile virtual technologies which have resulted in the creation of the Appnetic and Lumious platforms.



GEORGE CHURCHWELL, PRESIDENT

George is the President of Tech 2000, Inc., a leading education solutions and mobile content management company. George is responsible for driving Tech 2000's product development, long-term strategy and vision.

Tech 2000 is based in Herndon, Virginia. Our core strengths include content development, mobility, dynamic education tools, and training delivery for IT. Our proprietary adult learning methodology techniques are proven to provide the knowledge and cutting-edge technical capabilities required in today's telecom industry. In addition to winning awards such as the Silver Brandon Hall Excellence in Innovation Award, Tech 2000 also won the Sakigake Innovation Award at Cisco in 2009, 2010, 2011, and 2012.

With almost 30 years experience in the networking industry, George's focus has been on improving training for the broadband service provider workforce, particularly through the use of dynamic e-learning and mobile techniques. George's specialties include, MEF-Carrier Ethernet Certified Profession (MEF-CECP), Cisco Certified Systems Instructor (CCSI) for Cisco's ARK9K, CRS3, and XRFund, products and technologies.



LORE SYSTEMS, INC @loresystems

Lore Systems helps our clients with cutting-edge IT network engineering and managed services solutions. Lore architects, designs and delivers managed hosting and cloud computing systems, and outsourced IT network infrastructure, support and help desk solutions that easily accommodate our clients' unique requirements. At Lore, we strive to provide the very best customer experience in the industry by making IT "Easier, Friendlier, and More Reliable."



ANDREW ZALESKI, VICE PRESIDENT AND DIRECTOR OF INFORMATION TECHNOLOGY

Andrew (Drew) Zaleski is Vice President and Director of Information Technology at Lore Systems, Inc. an IT professional services company which provides enterprise network engineering, virtualCIO, managed hosting, and cloud services. At Lore, Drew has oversight

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of the Company's engineering operations and sales engineering functions, and built the Company's vCIO (virtual Chief Information Officer) practice.

Drew has over 16+ years of experience in design, installation, configuration, administration and troubleshooting of LAN/WAN infrastructure and security, leveraging a multitude of technologies to produce solutions. He holds ITIL, Microsoft and other professional certifications.



Wilson Sonsini Goodrich & Rosati
PROFESSIONAL CORPORATION

WILSON SONSINI GOODRICH & ROSATI @wilsonsini

Wilson Sonsini Goodrich & Rosati is the premier legal advisor to technology, life sciences, and other growth enterprises worldwide. We represent companies at every stage of development, from entrepreneurial start-ups to multibillion-dollar global corporations, as well as the venture firms, private equity firms, and investment banks that finance and advise them.



MICHAEL LABRIOLA, PARTNER

Michael Labriola is a partner in the Washington, D.C., office of Wilson Sonsini Goodrich & Rosati, where he works with public and private technology companies through all stages of their growth. Michael also frequently represents investment banks, venture capital funds, and private equity firms in a broad range of investment transactions.

Michael's practice focuses on corporate and securities law, including general corporate representation, IPOs, VC financings, and M&A. He has assisted clients with matters ranging from formation and early-stage venture financing to IPOs on U.S. and foreign exchanges. He also has considerable experience in counseling publicly held companies on disclosure matters, SEC compliance, NASDAQ and NYSE listing matters, and other securities laws issues.

Prior to law school, Michael was a senior auditor with Arthur Andersen LLP's Chesapeake-region growth, services, and products assurance practice and later with Ernst & Young's assurance and business advisory division. While at Arthur Andersen and EY, Michael audited public, private, and not-for-profit entities in several sectors. Michael is a CPA in Virginia.



BDO @bdoaccountant

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on timeless values, motivated by entrepreneurial thinking, anchored by individual accountability and professionalism, and distinguished by quality and independent service, our distinct culture is the reason people who know, choose BDO.



MARK ANDERSEN, PARTNER

Mark is the Technology Audit Practice leader for BDO's Tysons, Virginia office. Mark focuses on working with early and growth-stage venture-backed technology companies and government contractors. Mark's clients range from early stage startups to well-established middle-market enterprises with domestic and international operations. His 22 years of experience in both public accounting and in private industry allows him to provide practical insight into his clients' accounting issues.



BNY MELLON @bnymellon

BNY Mellon Wealth Management is among the nation's leading wealth managers, with 229 years of experience in providing investment management, wealth and estate planning, and private banking services to financially successful individuals and families, family offices, and nonprofits. Locally, we have a specialized expertise advising entrepreneurs making the transition from leading a company to living off of an investment portfolio.



CHRISTOPHER K. ROSS, SENIOR PORTFOLIO MANAGER

Mr. Ross is a Senior Portfolio Manager in the Washington, DC office of BNY Mellon Wealth Management. He leads client relationships and their investment strategy. Mr. Ross currently serves as a voting member of the BNY Mellon Investment Strategy Committee and formerly served on the BNY Mellon Equity Strategy Committee.

Mr. Ross has more than 20 years of industry experience managing investments for wealthy families and institutions. Previously, he was with Wells Fargo Private Bank, where he was responsible for his clients' investment management, planning and balance sheet management needs. Mr. Ross was the Branch Office Manager for the DC office of Neuberger Berman, where he successfully grew the office to one of the most profitable at the firm.

Mr. Ross holds a Master of Business Administration from the Mason School of Business at the College of William & Mary. He also holds a dual Bachelor's degree in Economics and History from Salisbury University. Additionally, Mr. Ross has completed post graduate work at the Johns Hopkins University.

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RSM US LLP @rsmusllp

RSM is a leading provider of assurance, tax and consulting services focused on the middle market. We guide our clients through complex business challenges by understanding their needs and bringing together the right team to address them. With nearly 8,000 professionals and associates in 80 cities nationwide and access to more than 32,000 people in 110 countries through our membership in RSM International, we can meet your needs wherever in the world you do business.



CHARLES G. CARR, CPA, ASSURANCE PARTNER

Chuck is the Assurance leader of the Washington Metro Offices, Technology and Life Sciences practice. This practice covers companies representing the technology services, software, SAAS, telecommunications, media, biotech, pharmaceutical, and medical device sectors. Many of these companies are backed by private equity and venture capital. Chuck has over 30 years of public accounting experience. Prior to joining RSM, he previously served as the Greater Washington Emerging Growth Company practice leader for Deloitte.

Chuck has a strong working knowledge of the many issues public and private companies face, including accounting, reporting, and corporate governance. As a result of his experience, Chuck is familiar with technological changes, venture capital equity/debt accounting issues, accounting for acquisitions, SEC preparation and reporting, IPO readiness, global expansion issues, as well as working with complex stock-based compensation and revenue recognition issues. Chuck has worked with multiple companies as they moved through their IPO process and has worked with many other companies through their successful sale to either financial or strategic buyers. Chuck is passionate about working with high growth companies while guiding them through their ever changing life cycle.



MONTGOMERY COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT @montgomerycomd

The Montgomery County Department of Economic Development creates and administers programs that support and grow our diverse business community, expand the county's economic base and provide employment opportunities for residents. Through our Business Innovation Network, Agriculture Reserve, Small Business Mentorship and Small Business Empowerment programs, Workforce Services and Strategic Financing programs, we assist businesses at all stages of growth. To learn more, contact us at 240-777-2000, e-mail us at ded.info@montgomerycountymd.gov or visit www.ChooseMontgomeryMD.com.



SALLY STERNBACH, ECONOMIC DEVELOPMENT DIRECTOR

Sally currently serves as Acting Executive Director for the Montgomery County Department of Economic Development. She joined the department in 2012 as Deputy Director. Since that time,

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she has been instrumental in developing programs to support the local business community including the MOVE, the Life Sciences Impact Grant, the Business Innovation Network, and Cybersecurity programs.

Previously, Sally served as the Executive Director for Rockville Economic Development, Inc. During her tenure there, she launched the Rockville Women's Business Center, gained approval for a hotel for Rockville Town Center, participated in successful bids for Choice Hotels and MesoScale Diagnostics headquarters, initiated the Rockville Innovation Center which today houses 35 start-ups, and created a women's business plan competition with \$20,000 in annual cash prizes and an annual Postdoc Conference and Career Fair for 500 S.T.E.M. postdocs.

In her prior life, she spent 18 years with AT&T, taught accounting and finance, and ran a social services non-profit in NYC and a tourism development organization in West Virginia. Her proudest accomplishments, aside from her family, include national and international gold medals in rowing with the Potomac Boat Club and with Avalon.



FAIRFAX COUNTY ECONOMIC DEVELOPMENT AUTHORITY

@fairfaxcounty

The award-winning Fairfax County Economic Development Authority promotes Fairfax County as a business and technology center. The FCEDA offers site location and business development assistance, and connections with county and state government agencies, to help companies locate and expand in Fairfax County. In addition to its headquarters in Tysons Corner, Fairfax County's largest business district, the FCEDA maintains marketing offices in seven important global business centers: Bangalore, Boston, Munich, London, Los Angeles, Seoul and Tel Aviv.



DR. GERALD GORDON, PRESIDENT & CEO

Dr. Gerald L. Gordon, Ph.D., is the president and CEO of the Economic Development Authority in Fairfax County, Virginia, one of the largest office markets in the nation. He has been with the FCEDA since late 1983, during which time office space in the county grew from 32 million square feet to more than 115 million, and jobs in the county grew from 243,000 to about 600,000.

Dr. Gordon has also worked for Arlington County, Virginia, and the U.S. Department of Labor. He was instrumental in creating the Emerging Business Forum and bringing the 1998 World Congress on Information Technology to Fairfax County. In 2005, the FCEDA was named by Site Selection magazine as one of the Top Ten Economic Development organizations in North America.

Dr. Gordon holds a bachelor's degree from The Citadel, a master's degree from The George Washington University, and a doctorate in international economics from The Catholic University of America. He is the author of 13 books on strategic planning and economic development.

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RYAN & WETMORE, P.C. @ryanwetmorepc

Ryan & Wetmore is a full-service accounting and management consulting firm, servicing the Northeast/Mid-Atlantic region since 1988. What makes us different from other accounting firms is our proactive approach. We work hard to earn our clients' confidence by encouraging open communication year round. This approach has enabled us to help clients become more efficient, more competitive, and more profitable. Through our numerous management engagements, we have become trusted, unbiased advisors.



PETER T. RYAN, CPA, CO-FOUNDER & PARTNER

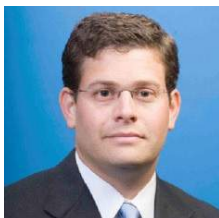
Pete co-founded Ryan & Wetmore in 1988, a 3 office, 35 person firm serving the Mid-Atlantic region. He currently works with clients to address tax, audit and accounting issues. He also has significant experience in international tax matters and business consulting services. His expertise extends to: Healthcare organizations, Construction and Real Estate, Government contractors, Technology, Manufacturing, and High Net Worth Individuals.

Pete has served on the Board of Directors for a number of organizations. He is an active member of the Healthcare Advisors Association, the Real Estate and Construction Association, the CPA Manufacturing Services Association, the Virginia Transportation Construction Alliance, and the Construction Financial Management Association. He has an MBA in Finance from the University of Baltimore and a B.A. in Accounting from the Catholic University of America. He is a member of the AICPA, Maryland Association of CPAs, Virginia Society of CPAs, and the Greater Washington Society of CPAs.



TODD A. SHERBACOW, CEO, EMISSARY REALTY, LLC @tsherbacow

Mr. Sherbacow founded Emissary Realty, LLC to provide service lines not currently available in commercial and residential markets. As your emissary, we are your trusted agents and cover all aspects of your real estate needs. We roll up our sleeves with our clients and interact with architects, contractors, and budgets. We help with furniture, data cabling and wiring and even telephones and IT.



Emissary Realty also handles retail and residential transactions offering all brokerages under one roof. Emissary Realty represents tenants. Mr. Sherbacow and the team have worked for publicly traded companies such as Trammell Crow Company and CBRE. They learned how to lease space for owners but the conflicts were obvious. This background is critical for knowing how landlords calculate the value of deals and what's most negotiable.

Mr. Sherbacow obtained a B.A., International Affairs from GWU. For nine years he has volunteered as a mentor for the Hoop Dreams Academic Scholarship Fund and is active in the lives of four students who were the first in their family to attend college. Mr. Sherbacow also serves on the Board and of the Jewish Historical Society of Greater Washington. Mr. Sherbacow is an avid golfer, skier, tennis player and cyclist.

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INSTITUTE FOR EXCELLENCE IN SALES @IESBD

The Institute for Excellence in Sales (IES) helps sales professionals worldwide and in the DMV crush their quotas. IES is your trusted partner for the best sales services, products, and training in the world. We have monthly programs in Tyson's Corner, VA for sales pros featuring presentations and workshops by some of the greatest sales thought leaders and authors on the planet. The workshops are held at the USA Today Building. The IES runs sales programs for companies, Women in Sales, and Millennials in Sales.

The IES also holds the Mid-Atlantic region's only award program that recognizes corporate and organization sales excellence. This year's event was on June 3, 2016 and recognized companies that have exhibited greatness in sales or BD such as Everfi, DLT Solutions, Iron Bow and Deltek. This year's Lifetime Achievement Award winners were immixGroup leaders Art Richer, Steve Charles, and Jeff Copeland. Our website is i4esbd.org



FRED DIAMOND, FOUNDER

Fred Diamond is the main man for companies looking to increase their revenues and make their sales teams more effective. He created the IES in 2010 and leads its strategic endeavors.

With expertise garnered by working with world-class firms such as Apple, Compaq, Microsoft, and Oracle, Fred made his mark before creating the IES as the outsourced marketer of choice for technology and professional service CEOs looking to get their vision into the marketplace and sales leaders who know that their companies can go-to-market better. His approach to marketing has especially been well received by international companies looking to enter US markets. As the CEO of the Institute for Excellence in Sales, he helps company leaders achieve their business goals by growing strong revenue channels and programs.



GEORGETOWN ENTREPRENEURSHIP INITIATIVE @startuphoyas

The Georgetown Entrepreneurship Initiative enables students to see the world as entrepreneurs do, while providing the knowledge and skills they need to act on their insights and add value to society. Our mission is to create a culture of entrepreneurship throughout the Georgetown University community insuring that all members have the opportunity to explore and experience what it means to behave like an entrepreneur.

We INSPIRE students by encouraging entrepreneurial thinking, TEACH students about entrepreneurship through the experiences of accomplished entrepreneurs, CONNECT students to a community of entrepreneurs and innovators on and off campus, and encourage students to LAUNCH new ventures.

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JEFF REID, FOUNDING DIRECTOR OF THE GEORGETOWN ENTREPRENEURSHIP INITIATIVE OF THE MCDONOUGH SCHOOL

@hoyapreneur

Jeff Reid is the Founding Director of the Georgetown Entrepreneurship Initiative. He has previously held leadership roles at the Network for Teaching Entrepreneurship, DigitalBridge Communications, DLA Piper, and the University of North Carolina at Chapel Hill.

In 2009, Reid launched the Georgetown Entrepreneurship Initiative to catalyze entrepreneurial thinking and activities across Georgetown University and make a broader impact in the DC entrepreneurial community. In 2012, Georgetown was recognized by the Global Consortium of Entrepreneurship Centers as a global leader in entrepreneurship education. Reid was also the founding director of the McDonough School of Business Real Estate Finance Initiative, where he helped raise over \$6 million in seed funding.

At UNC, Reid was the founding executive director of the Center for Entrepreneurship, which he grew to a No. 1 national ranking by Forbes and Princeton Review. He earned a B.S. in business from Appalachian State and an MBA from UNC Chapel Hill.



THE DINGMAN CENTER FOR ENTREPRENEURSHIP, AT THE ROBERT H. SMITH SCHOOL OF BUSINESS, UNIVERSITY OF MARYLAND

@umd_dingman

The Dingman Center for Entrepreneurship is a top-tier entrepreneurial institute recognized around the world as a leader in enterprise creation. The Dingman Center is continuously pushing the boundaries of teaching and learning with its focus on practical entrepreneurship, global innovation and international classroom experiences. The Center promotes opportunities that provide maximum resources to start-up businesses in terms of ideation, execution and financing; and that support its mission to take entrepreneurs “from the back of a napkin to the first \$1 million in financing.”



ELANA FINE, MANAGING DIRECTOR @elanafine

Elana Fine is Managing Director of the Dingman Center, where she leads the Dingman Center in support of its mission and strategic plan. Key responsibilities include oversight of our student venture incubator, Dingman Center Angels investor network, business competitions, and technology commercialization efforts. Elana also develops and maintains relationships with donors, board members, EIRs, the Smith School community and other campus and regional partners. She is also co-chair of the Dean’s Task Force on Entrepreneurship and Innovation.

Prior to joining the Dingman team, Elana was an Associate and a VP of Revolution Partners, an investment bank where she advised on a variety of tech transactions ranging between \$5 and \$100 million, including venture investments, sell side and buy side acquisitions and fairness

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opinions. Elana also served as Revolution's CFO from 2003-2006. From 1997-2000, she was a consultant with Accenture, where she implemented technology solutions for clients in the financial services, government and natural resources industries.

Elana earned an MBA in Finance and Accounting from the University of Chicago's Booth School of Business in 2002, and earned a BS in Finance, magna cum laude, from the Smith School of Business at the University of Maryland, College Park, in 1997. Elana resides in Potomac, Maryland, with her husband and two children.



SMARTCEO @smartceo

SmartCEO is the largest platform for regional events and content, serving an exclusive community of growth-minded CEOs and business leaders. Our mission is to educate and inspire visionary leaders at our high-energy entrepreneurial events and with access to valuable online, video and print resources. Currently operating in the Mid-Atlantic region with offices in Philadelphia, New York, Baltimore and Washington, DC.



HEATHER LOUISE FINCH, MARKET DIRECTOR @finch_lou

Heather Louise Finch is the Market Director for SmartCEO in the Greater Washington, DC region, where she works with C-level executives to help them grow their companies through involvement with the SmartCEO community. She is responsible for SmartCEO's overall business development and marketing activities in the DC market.

Prior to joining SmartCEO, Heather Louise worked in Raleigh, NC at T.A. Cook, an international management consulting company for asset and operations management. Prior to T.A. Cook, she worked in the North Carolina Governor's Office of Bev Perdue.

Heather Louise is a graduate of Peace College, where she received her B.A. in Communication with a minor in Spanish. She studied in exchange programs in Qatar, Spain, Morocco and Japan. She received the Public Leadership Education Network (PLEN) Scholarship and is involved with a variety of nonprofits in the DC Community, such as the Junior League of Washington, Bright Beginnings, Inc.; the March of Dimes; and UNA-NCA.



3RD ANNUAL WHARTON DC INNOVATION SUMMIT

The Wharton Club of Washington, DC (whartondc.com) supports the Greater Washington, DC business community and alumni success in our region through our rich calendar of events – a total of 150 to 200 or more each year - as well as liaison with the Wharton School, and other professional and alumni groups.

On April 26-27, 2016, the Wharton DC Club hosted the 3rd Annual Innovation Summit where attendees met fellow entrepreneurs, funders, mentors, leading Wharton, and Penn professors. In workshops, startup veterans provided attendees market-tested planning and execution steps,

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boosting their “success quotient” as they pushed their idea ahead. Stay tuned for information on the 4th Annual Innovation Summit coming in Spring 2017!



ALI QURESHI, VICE PRESIDENT @aliq21

Ali Qureshi serves as VP of Consulting Services at Xcelerate Solutions. Ali brings nearly two decades of experience assisting Federal Government and commercial clients in meeting their technology services needs through innovative solutions. He is currently the VP for Programs and the Program Chair for the 2015 Wharton DC Innovation Summit. He is also the organizer for the Federal Big Data Working Group, a meetup that provides opportunities for a broad community of participants to focus on big data products for the Federal Big Data Initiative.

Prior to joining Xcelerate, Ali had leadership experience in a number of healthcare technology start-up companies. He was Chief Technology Officer for RF Telematics, which delivers the MedLogiq data management platform for the healthcare market. Previously, Ali served as the Chief Operating Officer for MedRed LLC which develops medical records and clinical decision support systems. Ali holds a Bachelor’s Degree in Environmental Engineering from Wilkes University and an Executive Master’s Degree from the Wharton School and School of Engineering and Applied Science at the University of Pennsylvania.



HAFEZICAPITAL INTERNATIONAL CONSULTING @hafezicapital

HafeziCapital International Consulting is an international financial and business consulting firm offering the following services: Growth Consulting (sales, margins, income, cashflow, valuation, leverageratios); Organization Consulting (structure, process, delivery, supply chain, restructuring); Capitalization Consulting - advising on matters of raising capital; International Consulting - entering new global markets (feasibility studies, country risk analysis, market entry strategy, joint venture development, acquisition analysis, supply chain audits, outsourced international market entry).



BABAK HAFEZI, MA, MBA, CEO @bhafezi

Babak Hafezi is a seasoned entrepreneurial business expert in the areas of strategy, turnarounds, growth, capitalization and international market entry consulting. He has a demonstrated expertise in strategy development, reorganization and reengineering. His advice is actively sought by leading global CEO’s, government officials and news agencies such as Investors Business Daily, Thomson Reuters, and Forbes.

Babak obtained a Bachelor’s degree in International Relations with a focus on Middle Eastern Studies and a M.A. in International Peace & Conflict Resolution and an MBA from The American University. Babak has volunteered at Network for Teaching Entrepreneurship (NFTE), and serves on numerous Board of Directors positions, and advisory boards among them his alma mater the School of International Studies’s Young Alumni and Friends Committee at the American University.

CONNECTpreneur Forum, June 30, 2016

SPEAKERS

First Name	Last Name	Title	Company
Rick	Rudman	Chairman, President & CEO	Tracx
Tien	Wong	Chairman	Tech 2000 & Lore Systems
Hank	Torbert	Principal & Managing Director	RLMcCall Capital Partners
Jack	Biddle	General Partner	Novak Biddle Venture Partners
Andy	Jones	Managing Director	Maryland Venture Fund
April	Young	Managing Director	Hercules Technology Growth Capital

PRESENTERS

First Name	Last Name	Title	Company
SAM Solutions			
Earl	Furfine	CEO	5AM Solutions
Brent	Gendleman	Founder	5AM Solutions
William	FitzHugh	Chief Science Officer	5AM Solutions

ANEXIO

Tony	Pompliano	President & CEO	ANEXIO
John	Kraft	Sales Vice President	ANEXIO
Bill	Rose	Data Center Manager	ANEXIO

AppTek

Adam	Sutherland	CEO	AppTek
Emily	Ahdieh	Client Services Assistant	Morgan, Lewis & Bockius LLP
Matt	De La O	Director	Seabrook Partners

iThrivePH

Marc	Isaacson	CEO	iThrivePH

Legal Decoder

Joe	Tiano	CEO	Legal Decoder
Chris	Miller	COO & CTO	Legal Decoder
Louis	Bevilacqua	Managing Member	Bevilacqua PLLC

PayKii

Nelson	Irizarry	COO	PayKii

Zoobean

Felix Brandon	Lloyd	President & Chief Dad	Zoobean
Hilton	Augustine, Jr.	Angel Investor	Englare Inc.

ATTENDEES

First Name	Last Name	Title	Company
Steve	Abramowitz	CEO	CEO Boardroom
Fredric	Abramson	CEO & Founder	Digital Nutrition
Rachel	Adler	Digital Media & BD Manager	Fairfax County Economic Development
Mirza	Ahmad	Founder	Menushare, Inc
Camille	Alexander	Senior Director	BNY Mellon
Ahmed	Ali	President	TISTA Science & Technology
Ali	Allage	CEO	Boost Labs LLC
Dr. Prakash	Ambegaonkar	Founder & CEO	CareersUnbound Inc
Serge	Amouzou	CEO	Delect Technologies LLC
Claudia	Andahl	Marketing Director	
Mark	Andersen	Partner	BDO USA, LLP
Walt	Anderson	Director	Avealto
Christian	Arthur	Editorial and Multimedia Intern	DC Inno
Saron	Asfaw	Co-Founder	East Habesha
Craig	Asher	Principal	Vital Venture Capital
Ethan	Assal	Managing Partner	CYwP Fund
Larry	Austin	President	StarWalker LLC
Michael	Austin	CEO	Business & IT Solutions
David	Bain	President	TM Technologies, Inc

First Name	Last Name	Title	Company
Douglas	Baker	Managing Director	Monument Capital Group
Trish	Barber	Founder	3 Ways Digital
Henry	Barratt	Managing Director	Blue Water Capital
Meghan	Barry	Account Executive	SmartCEO
Tim	Batchelor	Chairman	White Peak Capital
Richard	Bates	CIO	Zeiders Enterprises
Maria Rose	Belding	Founder & President	MEANS Database
Afrika	Bell	Founder	ABK Creates
Shashi	Bellamkonda	Chief Marketing Officer	Surefire Social
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Lily	Bengfort	President	UAS Safeflight
Danielle	Bennings	Director of Events & Public Relations	Plank Industries
Elizabeth	Benson	CEO & Founder	B & G Educational Innovations
David	Bentley	Owner	MissionTeq
Casey	Berman	President of Operations	Berman Enterprises LP
Kimberly	Blackburn	Director, Events & Sponsorships	Eastern Foundry
Randy	Blake	Principal	Duncaster Investments
Aaron	Bloch	Co-Founder	CourseHunter
James	Bo	Founding Partner	TsingSun Capital
David	Bohigian	Managing Partner	Pluribus Ventures
JP	Bourget	CEO	Syncurity
Dan	Bowman	Communications Associate	Eastern Foundry
Benjamin	Bradburn	Director	Fair Chance Fund
Chris	Braddock	Founder	Zinthu
Steve	Britt	Managing Partner	Berenzweig Leonard, LLP
Kathy	Broe	Director Compliance	Lore Systems, Inc
Rafael	Cabrera	Student	American University
Jim	Cannon	CEO	Toto Communications
Sara	Capra	Co-Founder	Orate
Charles	Carr	Assurance Partner	RSM US LLP
Lyles	Carr	Senior Vice President	The McCormick Group
JJ	Carrasco	Managing Partner	Atoll Financial Group
John	Casey	Managing Director	Venture Mentors LLC
Javier	Castro	President	PE / Venture Capital Club (Kogod)
Prakash	Chakravarthi	Founder & CEO	Machfu Inc
Andrew	Chang	Managing Partner	Eastern Foundry
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Skip	Chapman	CEO	MissionTeq
Antonia	Chen	Financial Analyst	Tech 2000, Inc
Jeff	Cherry	Executive Director	Conscious Venture Lab
Yonald	Chery	CTO	Data Tribe
Ed	Choi	VP, Worldwide ISB	Hewlett Packard Enterprise
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Luke	Chung	President	FMS, Inc
Derek	Coburn	CEO & Co-Founder	Cadre
Dan	Coffing	President	Syntegrity Networks
Bob	Cohen	Principal	Glass Jacobson Financial Group
Buff	Colchagoff	CEO	Nitor Group
Bill	Collins	Chairman & CEO	The Collins Companies
Jerry	Comanescu	Licensing Associate	George Washington University
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Christine	Copple	CEO	Starise Ventures
Tony	Cord	CEO	DC Growth Partners
Alicia	Coronado	Researcher	Johns Hopkins University
Helia	Costa Lopes	Student	American University
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Gordon	Davidson	Chairman	Lightsense Technology
Caitlin	Davis	Student	George Washington University
Spencer	Deese	CEO	The Community Company

First Name	Last Name	Title	Company
Dennis	Defensor	President	Distrix Networks
Ariel	Deitz	DC Community Lead	Vinetta Project
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Taylor	Devine	Founder and Managing Partner	The CDI Group
Fred	Diamond	Founder	Institute for Excellence in Sales
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Philip	DiMuro	Co-Founder & CEO	Loople Mobile, LLC
Bob	Dinkel	Managing Director	Pierce Capital Partners
Rich	DiPippo	Partner	Meltzer Group
Randy	Domolky	Managing Director	Private Access Network
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John	Ellingson	CTO	Augusta Management Strategies
Grant	Elliott	CEO	Ostendio, Inc
Jeff	Englander	Senior Vice President Biz Dev	CyberTimez
Christian	Espinoza	Student	
Alexander	Evans	EVP & COO	Tyco eTech
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Gregory	Feldman	President	Three Wire Systems, LLC
Whitney	Ferguson	Events Director	Washington Business Journal
Vanessa	Ferragut	Founder & CEO	Greenease
Mitchell	Ferrero	Director	Brightline Strategies
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Greg	Foscato	Account Executive	Wheels Up
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Doug	Hill	President	Nitor Group
Justin	Hinh	Founder & CEO	Sindustries Incorporated
John	Holiday	CEO	ExoCyte Therapeutics
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John	Klusaritz	Partner	Foley & Lardner
Mike	Knapp	CEO & Co-Founder	SkillSmart
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Eric	Koefoot	Managing Partner	PublicRelay
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Rachel	Koretsky	Founder & CEO	upace
Darcey	Krug	People & Strategy Consultant	Mercuri Urval USA

First Name	Last Name	Title	Company
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William	Kwao	Co-Founder	Posh
Mike	Labriola	Partner	Wilson Sonsini Goodrich & Rosati
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Curvin	Leatham	Founder & CEO	AreaProbe
Ines	LeBow	CEO & Transformation Executive	Enterprise Transformation Solutions
Alex	Lee	Operations	Untethered Labs
Jeannette	Lee	CEO	Cyper LLC
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Dan	Levy	Student	American University
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Yuanxi	Li	Freelance Journalist	Bloomberg Businessweek China
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Nick	Linsmayer	Operations Manager	Refraction
Katherine	Liola	President	Concentric Private Wealth
Gary	Lipsky	Managing Partner	Innovizo
Cindy	Liu	Global Senior Director	Equinix
Jim	Long	Managing Director	VentureCross Partners
Brad	Love	Analyst	ID Private Equity
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Jet	Lu	CTO	Budget Referee
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Andy	MacLean	BDS Director	BDO USA, LLP
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Mike	Marcantonio	Principal	Blue Heron Capital
Lori	Marcum	CEO	Disrupt6
June	Marshall	Founder & CEO	Repperio
Mike	Matalone	President	excelsior
Eric	Mayton	Intern	Blue Heron Capital
Lex	McCusker	Director, Student Entrepreneurship Program	George Washington University
Timothy	McGuckin	Co-Founder	IDENTIQi, Inc
C. Thomas	McMillen	President and CEO	Division 1A Athletic Directors' Association
Daniel	McNulty	Associate	J Street Companies
Art	Medici	Partner	Newport Board Group
Amir	Mehrbakhsh	Financial Analyst	Fundrise, Inc
Hina	Mehta	Associate Director	George Mason University
Erich	Meissner	Partner	LiftOff Health
Alejandra	Melgar	Business Development Manager	Executive Office Suites
Alan	Meltzer	CEO	The Meltzer Group
Todd	Mercer	CEO & Founder	Immersive Marketing Technology LLC.
Tim	Meyers	Managing Director	Baker Tilly
Mark	Meytin	Owner	1000ecofarms
Stefan	Midford	President & CEO	Natural Insight
Flavius	Mihaies	Founder	Our Man In
David	Miller	CEO	RideLeads
Susan	Miller	Chief Marketing Officer	AnyPresence, Inc
Calvin	Millien	Student	Georgetown University
Randy	Mitchell	Vice President, Strategic Engagement	Emerging Markets Private Equity Assoc.
Stas	Mitchell		
Medi	Monam	MBA Student	Georgetown University
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Adam	Motiwala	Account Manager	Fifth Tribe
Douglas	Muir	CEO	Muir & Associates

First Name	Last Name	Title	Company
Billy	Murch Elliot	Chief of Staff Intern	Lore Systems, Inc.
Marie-Louise	Murville	CEO	Delight Me, Inc
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George	Nagy	Partner	Terminus Group, LLC
Lowell	Nerenberg	Leadership & Management Coach	Coach Lowell
Kim	Nguyen	Principal	Blu Venture Investors
Tu	Nguyen	Finance Consultant	Ryan and Wetmore
Mark	Norris	Managing Partner	Go-Path, Inc
Nathalyn	Nunoo	Co-Founder	Posh
Gary	Officer	Founder	REQWIN
Tegan	Olivia	Director of Education	Joss Business Advisory Services
Brian	O'Neill	CFO	DeepMile Networks, LLC
Paul	Opalack	CEO	Tech 2000 & Noblestar Capital
Svitlana	Orehkova	Student	George Washington University
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Brian	Park	Director, DC	Startup Grind
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Koustubh	Parulekar	CFO	NextInfra
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Kimberley	Person	BPA	Insperity
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Dave	Phelan	Co-Founder & CMO	Loople Mobile LLC
Tom	Pines	CEO	Real Magnet
Christine	Piry	Market Director	SmartCEO
Nicholas	Pisciotta	CEO	Sicuro
Andrew	Polcha	CEO	World Pipe Communications Corporation
Siddharth	Potbhare	CEO	Untethered Labs
David	Potter	Co-Founder	Curu
Jonathan	Price	Account Manager	CSC Leasing Co.
Rob	Quartel	Chairman & CEO	NTELX
Phillip	Quatrini	Partner	Rimon Law Group
Ali	Qureshi	Program Chair	Wharton DC Innovation Summit
Harley	Radin	Private Investor	
Andrew	Ray	Board of Advisors	CMM Ventures
Brian	Razzaque	CEO	SocialToaster, Inc
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Ben	Rodgers	Senior Wealth Director	BNY Mellon Wealth Management
David	Rosenberg	Founder & CEO	Budget Referee
Thomas	Rosenfield	President	HillStaffer LLC
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Michael	Ross	CEO & Chairman	Euclid Systems Corp
Timothy	Ross	Partner	CohnReznick LLP
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Margarita	Rozenfeld	CEO	Incite International
Paul	Ruppert	Mentor	1776 & OpenMind Networks
Pete	Ryan	Partner	Ryan and Wetmore
Daniel	Ryan	Associate	Alikos Wealth Management
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Justin	Sampson	Vice President	Next Sector
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Alan	Schlaifer	President	Wharton DC Innovation Summit
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Robert	Schwartzberg	Special Advisor	National Capital Companies, LLC
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First Name	Last Name	Title	Company
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Jennifer	Sherman	Account Executive	SpeakerBox Communications
Parag	Sheth	Managing Director	Radius
Jenny	Shtipelman	Senior Vice President	EagleBank
Seth	Shuldiner	Investment Analyst	Maryland Venture Fund
Cal	Simmons	Chapter Chair	Tiger21
John	Sitilides	Government Relations Specialist	3doo
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Michael	Slage	Co-Founder & CEO	LiftOff Health
Abbey	Slitor	MarCom Director	Kiddar Capital
Benjamin	Smith	Associate	AVX Partners
Bill	Smith		
Cee	Smith	Founder & CEO	RainbowNoise , Cee Smith Media
Rick	Smith	CEO	Venture Partners USA
Jim	Smolen	Head of Strategic Alliances	LiveSafe
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Norman	Snyder	Partner	Aronson LLC
Anthony	Solazzo	Managing Partner	Masonboro Partners
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Oron	Strauss	Chairman	Babel Health, LLC
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Andrew	Tucker	Partner	Womble Carlyle Sandridge & Rice LLP
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Lance	Ullom	Principal	Blu Venture Investors
Prachi	Vakharia	Engagement Manager	RideAmigos
Gretchen	Van der Veer	CEO	Fair Chance Fund
Anne	Van Gilson	Angel Investor	
Shally	Venugopal	Founder	Myolo
Charlie	Venus	Vice President	Brown & Brown Insurance Agency of VA
Adam	Viener	Founder	Imwave & Yazing
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Robert	Walker	President	PCPursuit
David	Wang	Founder & Chairman	Pacific Trade International
Neil	Wasserman	Managing Partner	Timewave Analytics, LLC

First Name	Last Name	Title	Company
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Laura Lee	Williams	CEO & President	Laura Lee Designs, Inc
Shememe	Williams	Founder & CEO	My Active Senior
Dennis	Wilmeth	Retired	Microgreens
Bennett	Wilson	Senior Consultant, Tech Transfer	Hyperion Technologies LLC
Harry	Wingo	Founder & Principal	West River Solutions LLC
Jeff	Wolff	Co-Founder	IDENTIQi, Inc
Darren	Womer	President & CEO	National Capital Companies, LLC
Caroline	Wong	Intern	Opus 8, Inc
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Lily	Yeh	Founder	Little Loving Hands
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Sara	Zeller	Tax Partner	BDO USA, LLP

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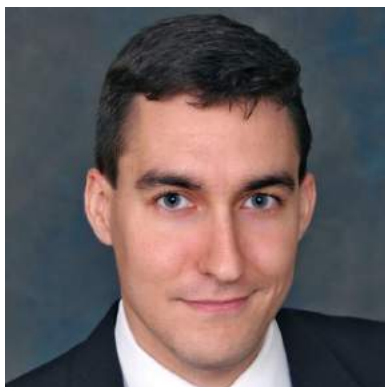
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ATTENTION!!

3 KEY QUESTIONS YOU MUST ANSWER

	Yes	No
Are you 100% sure your data is safe?	<input type="checkbox"/>	<input type="checkbox"/>
Is your network up at least 99.99%?	<input type="checkbox"/>	<input type="checkbox"/>
Are you 100% happy with your IT?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered “No” to any of these Qs, then contact us for a free consultation:
info@lore.net



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