

# Big CIdea CONNECTpreneur

### WINTER FORUM

December 14, 2016
Falls Church Marriott Fairview Park







GOVERNMENT INNOVATION & TECH FORUM APRIL 24 – 26 | WASHINGTON DC



Bringing the nation's top innovators and technology leaders together with leading government CIOs and buyers

April 24-26, 2017

Walter E. Washington Convention Center 801 Mount Vernon Place Northwest Washington, DC

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### Why attend G-TECH?

- 1500+ attendees
- 400+ Industry CEOs/CXOs
- 300+ Government execs and buyers
- Peer-to-peer time with decision makers
- VIP Networking Lounges and "Huddle Rooms" for deeper whiteboard and solutioning sessions
- Exhibit Hall Luncheons and Receptions
- Conference mobile app facilitates connections and meetings

#### **G-TECH Features**

- "Reverse Pitches"
   Government execs pitch their pain points and needs
- 125 Government Speakers CIOs, DCIOs, buyers, program and acquisition and contracting executives
- Innovation Showcases
   25 leading and emerging technologies
- 400+ Industry CEOs/ Presidents
- 100 Exhibitors
   Technology and Services
- 32+ Panels
   Hottest and most innovative topics facing the government, including expectations from the new Congress and new Administration

For Sponsorship and Exhibitor info, contact Kathy Broe kbroe@lore.net 703-932-9191

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#### **AGENDA**

07:00 – 08:15 am	REGISTRATION / NETWORKING			
08:15 – 08:20 am	WELCOME S. TIEN WONG, Chairman, Tech 2000 and	d Lore Systems		
08:25 – 09:10 am	FIRESIDE CHAT  STEVE CASE, Chairman and CEO, Revolution, LLC; Co-founder, America Online; New York Times bestselling Author of The Third Wave: An Entrepreneur's Vision of the Future.			
	COMPANY SHOWCASE			
	COMPANY	PRESENTER	TITLE	
	Untangle Life	Jēnna Reese	Founder	
	Aspire	Neil Shah	CEO	
	Department 60, Inc.	Michael Brandofino	CEO	
9:10 – 10:10 am	DiliVer LLC	Neil Kleinberg	Founder & CEO	
	Immersive Marketing Technology	Todd Mercer	CEO & Founder	
	IntelliSpeX	Blake Ratcliff	Founder	
	Scriyb	Christopher Etesse	CEO	
	Sparo Corporation	Rob Sobhani	Founder & CEO	
	World's Registry of New Ideas Jerry Comanescu CEO			
	SERIAL ENTREPRENEURS SHARE WAR STORIES  JEFF CHERRY, Founder and Exec. Director, Conscious Venture Lab; Managing Director,			
	Conscious Venture Fund; CEO, The Porter Group  8.10 – 11:00 am RIC FLEISHER, COO, UpsideDoor; Co-founder Urgent.ly			
10:10 – 11:00 am				
	DANIEL NEAL, CEO and Founder, Kajeet; CEO and Vice Chairman, VCampus			
	<b>LIZ SARA</b> , CEO, Best Marketing; Chair,	LIZ SARA, CEO, Best Marketing; Chair, Dingman Center for Entrepreneurship, University		
	of Maryland Robert H. Smith School of Business			
11:00 am	NETWORKING			

Join the conversation: @connectpreneur and #connectpreneur Next CONNECTpreneur Forum: April 4, 2017 Bethesda, MD



#### **SPEAKERS**



### STEVE CASE, CHAIRMAN AND CEO, REVOLUTION LLC; CO-FOUNDER, AMERICA ONLINE; CHAIRMAN, THE CASE FOUNDATION

Steve Case is one of America's best-known and most accomplished entrepreneurs, and a pioneer in making the Internet part of everyday life. He is also the author of the New York Times bestselling book, The Third Wave: An Entrepreneur's Vision of the Future.

As Chairman and CEO of Revolution LLC, a Washington, D.C.- based investment firm he co-founded in 2005, Steve partners with visionary entrepreneurs to build significant 'built to last' businesses. Revolution invests in and actively helps build companies leveraging technology to disrupt existing markets. This includes both early and mid-stage growth companies through both the Revolution Growth fund, created in 2011, and the Revolution Ventures fund, launched in 2013. Revolution has backed more than 30 companies, including: sweet green, Zipcar, Revolution Foods, LivingSocial, Bigcommerce and Optoro.

Steve's entrepreneurial career began in 1985 when he co-founded America Online (AOL). Under Steve's leadership, AOL became the world's largest and most valuable Internet company, driving the worldwide adoption of a medium that has transformed business and society. AOL was the first Internet company to go public and the best performing stock of the 1990s, delivering a 11,616% return to shareholders. At its peak, nearly half of Internet users in the United States used AOL. In 2000, Steve negotiated the largest merger in business history, bringing together AOL and Time Warner in a transaction that gave AOL shareholders a majority stake in the combined company. To facilitate the merger, Steve agreed to step down as CEO when the merger closed.

Steve's passion for helping entrepreneurs remains his driving force. He was the founding chair of the Startup America Partnership, an effort launched at the White House to accelerate high-growth entrepreneurship throughout the nation. Steve also was the founding co-chair of the National Advisory Council on Innovation & Entrepreneurship, and a member of President Obama's Council on Jobs and Competitiveness, where he chaired the subcommittee on entrepreneurship. In 2014, Steve was named a Presidential Ambassador for Global Entrepreneurship.

Steve has been a leading voice in shaping government policy on issues related to entrepreneurship, working across the aisle to advance public policies that expand access to capital and talent. He was instrumental in passing the JOBS (Jumpstart Our Business Startups) Act, and is active in advocating on behalf of immigration reform.

Steve is also Chairman of the Case Foundation, which he established with his wife Jean in 1997. Together the Cases have invested in hundreds of organizations, initiatives and partnerships with a focus on leveraging the Internet and entrepreneurial approaches to strengthen the social sector. In 2010, Steve and Jean joined The Giving Pledge and publicly reaffirmed their commitment to give away the majority of their wealth to philanthropic causes.



#### **SPEAKERS**



### 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 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 Montgomery County Economic Development Corp., CIT GAP Fund's Investment Advisory Board (IAB), the Digital DC Tech Fund IAB, 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.



### JEFFREY CHERRY, CEO AND MANAGING PARTNER, THE PORTER GROUP, LLC; FOUNDER AND EXECUTIVE DIRECTOR, CONSCIOUS VENTURE LAB

Over the last 29 years Jeff has been a designer, CEO, educator, consultant and investor. He enjoys the creative process, both from an artistic and organizational perspective. Currently he's bringing these divergent experiences together in order to help companies develop more conscious, purpose-driven business models; and to help investors build societal as well as financial value. He tries to bring right and left brain thinking to problem solving, business creation and investing ideas; hopefully asking better questions and using his expertise to make the lives of those around him more fulfilling and successful.

As the CEO of The Porter Group and Founder and Executive Director of Conscious Venture Lab, Jeff is an evangelist for the transformation of capitalism. The Porter Group is a venture capital firm that invests in early-stage and growth-stage companies that are operating at the intersection of profit and purpose. The Conscious Venture Lab is an accelerator for these same types of business using the tenets of Conscious Capitalism® and societal purpose as the foundation for creating



#### **SPEAKERS**

long-term sustainable value. With the Conscious Venture Lab as an emerging brand in this fast growing field, Jeff is also a frequently invited speaker on the topic of impact investing and new models of business. He has recently had the honor to present at The University of Maryland, The Darden School at the University of Virginia, Yale University, and Columbia University, The Booth School at the University of Chicago, Howard Community College and The University of Baltimore.

Jeff is a recovering NCAA DIII Football player, has a Black Belt in Tae Kwon Do and currently studies Krav Maga, the martial art and self-defense system developed by the Israeli Defense Forces (IDF).



#### RIC FLEISHER, COO, UPSIDEDOOR; CO-FOUNDER URGENT.LY

Ric Fleisher has over 30 years of experience in business development, sales and technology. He has been involved with 8 prior start-ups. These ventures have included mobile, location based services, ID verification, networking hardware, speech, streaming video, collaboration, intelligent agents and RFID. He has helped build early stage technology companies in software, hardware and service areas. His current start-up is UpsideDoor. UpsideDoor is changing the way people sell and buy real estate. Prior to UpsideDoor, he co-founded Urgent.ly – on-demand roadside assistance.



### DANIEL NEAL, CHAIRMAN, CEO AND FOUNDER KAJEET; CEO AND VICE CHAIRMAN, VCAMPUS

Daniel is the Chairman, CEO & Founder of Kajeet, a mission-driven company he first began dreaming about in 1996. Before launching Kajeet, Daniel served as CEO & Vice Chairman of VCampus Corporation, a public company that pioneered the delivery of e-learning applications and services for students, business people and government workers. Prior to VCampus, Daniel was part of the team that built - and successfully took public - USinternetworking, where he conceived of, launched, and led the AppHost<sup>™</sup> business unit. USinternetworking was acquired by AT&T. Daniel previously built international commercial relationships for the delivery of communications technologies and services for Sprint and Global One Communications, Sprint's joint venture with France Telecom and Deutsche Telekom. Daniel's early career was in commercial banking, and public service. He has worked extensively in local government, and later served as a senior staff member with the National Performance Review of the office of the Vice President of the United States.

Daniel holds an AB in political science from the University of California, Berkeley, and an MBA from the Wharton School of the University of Pennsylvania. Daniel has raised over \$120 million of investment capital and is a named inventor on 24 U.S. patents. He is active in many business, investment and technology circles, including Vistage and Mindshare. An avid bicyclist, runner and reader, Daniel most enjoys spending time with his wife and two children, whose names are incorporated in the word "Kajeet."



#### **SPEAKERS**



### LIZ SARA, CEO, BEST MARKETING; CHAIR, DINGMAN CENTER FOR ENTREPRENEURSHIP, UNIVERSITY OF MARYLAND ROBERT H. SMITH SCHOOL OF BUSINESS

Liz Sara has more than 25 years of experience in the local high tech community as an entrepreneur, business leader, angel investor and arts advocate.

In 2001, she founded Best Marketing, LLC to provide early stage tech companies with strategic marketing, PR and business development services. Her company offers all the benefits of a full-scale, seasoned marketing department on a 'virtual' basis — bringing an entrepreneur's perspective to solving the challenges of growing a start-up. Since inception, she has served as a virtual Marketing Chief for 90++ companies, assisting tech startups increase revenue and speed market adoption for their B2B products.

Previously, as co-founder of SpaceWorks, an eCommerce software company, she facilitated its startup and growth to nearly \$25 million in revenue; at America Online, she rebranded the company and created the PR program and IPO road show; at United Press International, she facilitated a turn-around strategy targeting the corporate market; and at LEXIS/NEXIS, she was on the startup team that created and successfully launched a new product and division.

She Chairs the Board of Advisors at the Dingman Center of Entrepreneurship at the RH Smith School of Business at U-MD and serves as Entrepreneur-In-Residence. She is an adjunct Marketing Professor. Liz holds an M.A. from the University of Maryland. She is a frequent conference speaker and author on topics related to e-business, marketing, entrepreneurism and angel investing. She holds Advisory Board positions in several technology companies. She invests in startups as a member of the New Dominion Angels and Dingman Center Angels.

She supports numerous Washington, DC charities. She has served on the boards of the Summer Opera, the Sewall Belmont House & Museum, the Business & Professional Women's Committee of the Corcoran, the Women's Committee of National Museum of Women In the Arts and the Executive Board of the Capital City Ball charity. She is a Women's Committee member of the NSO and currently manages Opera Camerata of Washington.



#### Introduction

UNTANGLE is an award-winning, and HIPAA-compliant mobile app designed to fulfill the needs of three specific customer groups in the Beauty, Health, and Wellness (**BHaW**) industry.

#### The Opportunity

- Beauty and anti-aging revenues in the United States were \$56.2 Billion in 2015; Women accounted for 92% of the 15.6 million cosmetic procedures performed in 2015.
- Only one-third of plastic surgery related malpractice claims were based on the quality of the
  plastic surgeons' technical skills the major factors were patient-related behavior and poor
  communication.
- Popular BHaW brands are increasingly using social media influencers to connect with customers. In June 2016, beauty-related content (e.g. tutorials, DIY, product reviews) generated more than 5 billion views.

#### The Needs

- BHaW Practitioners (e.g. Plastic Surgeons, Aestheticians etc.) need to ensure a positive client outcome due to proper at-home behaviors by extending communications beyond the traditional pre- and post- care methods.
- BHaW Clientele need to get the most out of their BHaW investments (e.g. treatments, regimens, products etc.) by properly following and completing pre- and post- care instructions at home.
- BHaW Social Influencers (e.g. Instagrammers, Snapchatters etc.) need to monetize their follower base by offering premium content of regimens, routines, tips, and tutorials.

#### The Solution

UNTANGLE provides BHaW Practitioners, Clientele, and Social Influencers the capability to:

- Send/Receive regimens and routines that include tips tailored directly toward personal needs and goals;
- Keep instructions and recommended/prescribed products organized in an integrated calendar;
- Instantly communicate any questions and follow-up details through a private one-onone messaging system that includes the sharing of media in a secure environment;
- Post/View educational and instructional content uploaded by the professional/influencer related to a specific routine or regimen; and
- Sell/Purchase desired products and premium content in oneclick directly through the UNTANGLE platform.

#### The Business Model

UNTANGLE leverages its patent-pending mobile platform in the following ways:

- Subscription Fees: A monthly subscription fee is charged to BHaW professionals that
  enables them to use UNTANGLE as a value-added service to their clients, whether it is
  prescribing maintenance regimens/after-care routines, communicating for upcoming
  appointments, or new product announcements and limited-time offers;
- Revenue Sharing: UNTANGLE earns a variable percentage from all sales generated by its platform; and
- BI Licensing Fees: UNTANGLE charges a licensing fee for limited, non-specific access to
  its growing database of information on habits, preferences and other data gathered by the
  platform.

The Financials	2017F	2018F	2019F
Gross Revenue	\$1.06M	\$3.6M	\$6.7M
Expenses	\$771K	\$2.03M	\$4.2M
EBITDA	\$293K	\$1.6M	\$2.5M

#### The Feedback

"UNTANGLE allows us to share our beauty collaborations and recommendations in one place in between appointments, whether we're supporting a surgical procedure, new skin care regimen, or maintenance of a new hairstyle. UNTANGLE provides an unprecedented level of comfort and confidence for our customers, which is always my top priority." Dr. Laura Holsey, Holsey Cosmetic Surgery, Salon and Spa, Oklahoma City, OK

www.untanglelife.com/jenna.reese@untanglelife.com/(703)586-7335

#### **INVITE ONLY LAUNCH**

August 2, 2016

#### **AWARDS**

Stevie Awards - International Business Awards (Aug '16)

• Bronze Smartphone/Tablet App of the Year

#### Stevie Awards - Women In Business (Nov '16)

- Bronze Innovator of the Year
- Bronze Smartphone/Tablet App of the Year

#### Best in Biz Awards (Nov '16)

- Bronze Innovator of the Year
- Bronze Most Innovative Product of the Year (SMB)

#### **FOUNDERS**

Jēnna Reese Malcholm Reese, Sr.

#### **MANAGEMENT TEAM**

#### JĒNNA REESE, Founder

- CEO & Founder of AEi International, a management and technology consulting firm serving clients in the federal, and health sectors
- Specialization in business strategy, agile development, and process improvement

#### **TEAM COMPILATION**

- Partner Ambassador
- Marketing Manager
- Program Manager
- Developers and Designers

#### **FINANCING SOUGHT**

- \$500,000 (SAFE)
- Capital Burn Rate: \$25,000/mo.

#### **USE OF FUNDS**

- Strategic Partnerships
- Scale to Additional Platforms

- Sales and Marketing
- Working Capital & IP Protection

#### CAPITAL INVESTED

• \$150,000 (Founders)



#### **Executive Summary: \$2M Seed-Stage Financing**

#### Overview

Aspire's software and services empower companies to invest in their employees and workplace in a smarter, easier way. Companies can use Aspire to coordinate employee engagement programs and in-office perks like team lunches, office snacks, wellness programs, happy hours, team outings and events and volunteering days. Aspire tracks usage, budgets, and employee feedback so companies can better understand the effectiveness of their programs.

In the last year since raising our seed round, Aspire has grown gross revenue 40% quarter-on-quarter. We actively provide services to over 60 clients, including Uber, UBS, Tableau, WeWork, Monumental Sports and many of the fastest growing tech startups in the Washington DC and Boston areas. We are raising \$2M to invest in sales and marketing to capture a significant piece of a \$50+ billion market.

#### Market

Mid-to-large sized companies worldwide are looking for better ways to engage their employees. 1.3 million businesses with 25-1000 employees in the US alone present a huge (\$50+ billion) market opportunity.

#### **Product**

Companies are paying more attention to employee engagement these days, but very few have a way to manage their programs and services effectively. Aspire provides a web-based software for providing smarter in-office benefits.

Aspire collects data about employee preferences and makes smart recommendations. Once a company chooses what they want, Aspire takes care of everything through its network of vetted, third party vendors. All the while, Aspire tracks ratings, feedback, and attendance data, which is used to refine recommendations and generate reports.

**Pricing:** Aspire makes its money on a combination of client fees and vendor discounts. To date, our margin has averaged 12.5%. As we scale, this will grow as we negotiate steeper discounts from vendors and higher fees from clients. Our competitors in catering and wellness have reported 20-30% margins, so we know this is possible.

#### **Traction**

We launched our Team Perks software in early 2015. We focused first on Washington, DC and later expanded to Boston. In our first year, we've added \$18k of new business every month on average. We've grown revenue 40% quarter-on-quarter to 60 active clients & \$1M gross revenue to date in 2016. Our client network is diverse, including: Uber DC, Carbonite in Boston, Northwestern Mutual DC, WeWork, TrackMayen, Optoro, and United Bank DC.

**Strong Recurring Revenue:** Four of our largest clients, including Uber, are on pre-paid contracts and 65% of all orders are subscriptions. We have 98% customer retention over the past 12 months and our software and services have a 95% client satisfaction rating.

#### **Historical Financial Summary**

	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Revenue	\$94,116.79	\$165,344.97	\$242,936.63	\$273,364.55
Expenses	\$99,427.58	\$86,746.78	\$84,467.70	\$97,497.00
Gross Profit	\$7,969	\$9,692	\$18,293	\$25,464

#### **Capital Financing**

We are raising a \$2M priced equity round at a \$6M pre-money valuation.

- Tranche #1: December 9th \$250,000 at a 20% discount
- Tranche #2: January 13th \$250,000 at a 10% discount
- Tranche #3: March 3rd \$1,500,000

**Use of Funds:** We are raising \$2M to hire an experienced head of sales and sales team, invest in marketing, and expand our engineering team to scale the model we've proven in DC and Boston.

**Investment to Date:** Aspire has raised \$800,000 from the founders and angel investors since 2015. All funding has been raised on a convertible debt basis and will convert into equity upon the close of this financing.



Contact Information Department 60, Inc (D60) 325 Goldfinch Drive Bridgewater, NJ 08807 (973) 951-1937 www.dept60.com mbrandofino@dept60.com

Management Team Mike Brandofino - CEO/CTO Kelly Harman - VP Marketing Sal Tumino - VP Operations Laurie Berg - VP Channels

Industry Software as a Service, Cloud based Digital Signage Service

Company Resources Currently the company has four employees and five contracted resources.

Type of Financing Sought: \$750K primarily for Sales Growth and Software Development.

Total External Capital Invested
To date the development and activities supporting D60 has been funded by the owners.

Professionals Gene Wolf – Advisor Joe Worth – CFO Advisor

Use of Funds Hire Sales and Marketing staff to support the channel and drive growth, Build a full time development team to drive the roadmap for the cloud service offering called Visualz.

Year Founded January 2016 (development began January 2015)

Type of Entity C-Corp

#### **Business Description**

The global Digital Signage (DS) market is expected to exceed \$27B by 2018, with Out of Home Advertising (OHA) adding another \$7.5B. The areas with the highest margin and growth are software, digital content services and advertising. Current solutions are expensive and difficult to use with a significant gap in solutions available for companies new to DS and smaller deployments.

Department 60, Inc. (D60) developed a cloud based service called Visualz, that is easy to sell, easy to buy and easy to use because there is no software or hardware to buy. For a low monthly license fee of \$49 per display device, customers can turn virtually any display device into a DS display in a few easy steps.

#### Management

Mike Brandofino and his team have a proven track record of success in developing new products and services, while growing revenues profitably. As founder and ultimately CEO/CTO of a public company called Glowpoint, Mike, along with Kelly Harman and Sal Tumino, grew recurring revenues from zero to over \$26M. In 2009, he joined AVI-SPL as an EVP and his team including Sal Tumino and Laurie Berg, were responsible for growing services revenue from \$18M to over \$70M in under 4 years.

#### Company Background

At AVI-SPL, one of the areas Mike Brandofino applied focus on was growing a DS practice. While the revenue quickly grew from 0 to over \$6M in the first year, it became apparent that there was a gap in the market for solutions that were cost effective and easy to use. Time and again customers would defer DS projects because of the startup costs and complexity. Upon leaving AVI-SPL in 2014 Mike started a venture with Laurie Berg to develop a cloud based service to address the gap in the market. At the same time he started a consulting company with Kelly and Sal to essentially fund the development and earn income while Visualz was being developed. In January of 2016, we merged the team and created D60, Inc. to be completely focused on driving revenue with Visualz, which officially launched September 1, 2016.

#### Technology/Proprietary Rights

In May 2016 D60 filed patent applications (i) for our Remote Emergency Override Capability, which enables authorized mobile devices to initiate emergency override messaging in a matter of seconds, and (ii) our Visualz Advertising Marketplace which automates the process of getting advertising campaigns onto displays that display owners have enabled to receive advertising. In addition to the patent pending technology, we are unique in that we include the Digital Media Agent (device that connects to TV's to display content) free with each subscription license. This represents a barrier for most competitors as they earn much of their revenue on hardware. Finally, we will be 100% channel focused and our platform has been built from the ground up to enable the channel to layer their own services on top of Visualz via our unique Channel Portal. Our experience and relationships in the AV integration industry have already opened doors and led to two channels agreeing to resell Visualz, Ingram Micro and AVI-SPL.

#### Marketing, Sales and Customers

The revenue growth of DS and OHA to a combined \$34.5B has been fueled by some impressive results on the effectiveness of DS. In one survey 47% of people recalled information they saw on a digital sign 30 days later and in another, digital displays capture 400% more views than static displays. Statistics like these and many others support the desire for organizations to leverage digital signage to get their own message out as well as offer occasional advertising from third parties. Our target customers will be those new to digital signage with 5 -15 displays. However, we have already seen demand from larger organizations including one opportunity for 70 displays across two corporate campuses.

#### Competition

Some competitors include EnPlug, Navori, Industry Weapon, Scala, X20 and Brightsign. Our advantages over these competitors include: Our focused channel portal, no hardware or software to buy, ease of use, low cost entry yet scalable design addresses any size organization and the advertising marketplace (Avail Q1 2017)

Financial Results and Projections (Model Starts on 9/1/16, therefore annual numbers are as of 8/31 for each year)

	Model Fiscal Year	2017	2018	2019
Revenue		\$442K	\$3M	\$11M
EBIT		\$(799)K	\$268K	\$4.5M



#### DiliVer LLC Investor Executive Summary

#### **Value Proposition**

**DiliVer** is a financial technology ("FinTech") mergers and acquisitions (M&A) software company with specialized due diligence solutions that help yield better combined entity outcomes and a variety of other transaction life-cycle benefits. Our industry-specific ("domain-verticalized")/data-driven ("scorecard-powered") applications drive a new due diligence paradigm that improves the quality and reduces the risk of M&A transactions for buyers, sellers, and their intermediaries.

improves the quality and reduces the risk of M&A transactions for buyers, sellers, and their intermediaries.			
Investor Highlights	Quick Facts		
<b>Challenge:</b> The lack of post-M&A transaction success for combined entities is largely attributed to a widely-accepted but highly-inefficient M&A due diligence paradigm, which has a deal team/ transaction-focused mindset and which uses a general-purpose/process-driven software toolset.	Website: www.diliver.com		
<b>Opportunity:</b> A new way of conducting M&A due diligence is needed that has a combined entity/ outcome-focused mindset and an industry-specific/data-driven software toolset that promotes "science for the art of M&A" with a metrics-driven scorecard that replaces an unstructured checklist.	Founded/Launched: May 2013/April 2014		
<b>Mission &amp; Vision:</b> DiliVer's mission is to create innovative M&A due diligence software products that help deal teams in select vertical markets optimize the new combined entities they are forming. Our vision is to combine this new software with existing horizontal market FinTech M&A software to create integrated "breadth and depth" solutions within a collaborative M&A ecosystem.	Corporate Status: Delaware LLC		
Addressable Market: The revenue for our new due diligence niche will be generated inside an existing and growing global addressable market of \$1.2B+ per year for FinTech M&A software.	Headquarters Office: 1783 Forest Drive Suite 323		
<b>Prospects:</b> Direct sales targets include buyers, sellers, and intermediaries that either perform M&A financial, legal, or operational due diligence services directly or require such outsourced services. Indirect channel sales targets include other M&A software vendors (e.g., virtual data room/VDR).	Annapolis, MD 21401  Phone:		
<b>Competitors:</b> We have no direct competition, but indirect competitors may include the FinTech M&A software vendors themselves ("coopetition"), as well as commercial-off-the-shelf (COTS) software package suppliers (e.g., office suite, CRM) for customized due diligence solutions.	301-502-0220 Industry/Sub-Industry/		
Intellectual Property: DiliVer's outcome optimization methodology is a framework that uses a 3-part approach to provide solutions before, during, and after the M&A transaction. Our enterprise performance model provides unmatched visibility into and measurability of an enterprise's current performance as well as future growth potential so that its long-term value can be optimized.	Domain/Software Product Category: Information Technology/ Financial Technology		
<b>Product Roadmap:</b> Our cloud/SaaS-based web and mobile software will be sold as 3 distinct applications (Buy-Side/Sell-Side/Unification). The prototype apps have been in production for over 2 years, while the alpha apps are being tested now. The minimum viable product will launch after a beta program in 7-9 months. The IT, healthcare, and energy industries will initially be served.	(FinTech)/FinTech M&A (Capital Markets)/ Scored Due Diligence (SDD) ** <b>New</b> **		
<b>Leadership:</b> Our founder/CEO had a recent successful exit with another FinTech software company and is the inventor of the software. The other CXOs/advisory board are ready on Day 1.	Law Firm: Cooley LLP		
<b>Traction:</b> DiliVer has 10 customers (buy-side/sell-side, strategic/financial) and trusted business partners (e.g., Johns Hopkins University, Founder Institute, MindShare, RR Donnelley, and eknow).	Bank:		
<b>Business Model:</b> 3 revenue streams—recurring SaaS subscriptions (unlimited users, vertical market software template, product maintenance), variable labor rates for optimization consulting services, and variable data usage charges for deal flow and combined entity outcome analytics.	Silicon Valley Bank  Executive Team:		
<b>Investment Request &amp; Use of Funds:</b> \$500K in seed funding (Year 1 debt/convertible note) to refine our software & IP and \$1.5M in Series A funding (Year 2 equity) to rapidly scale our verticals.	Neil Kleinberg (Founder & CEO) Mike Montera (CFO)		
Financial Projections:         2017         2018         2019         2020         2021           >> Revenue         \$341K         \$1,311K         \$3,970K         \$10,098K         \$22,246K           >> EBITDA (w/ Invest.)         (\$467K)         (\$975K)         \$51K         \$2,647K         \$9,766 K	Shaun Hanrahan (COO) Lowell Kasden (CBO) Stephanie Basil (CAO)		
Exit Strategy: DiliVer has identified 5 options for getting acquired (as early as Vear 3)—VDP	1 ' ' '		

Outsource CIO (Orion)

Outsource CTO (KnuVu)

Exit Strategy: DiliVer has identified 5 options for getting acquired (as early as Year 3)—VDR

software vendor, enterprise M&A/workflow software vendor, financial buyer (e.g., private equity firm

doing a consolidation), strategic buyer (e.g., large integrator), and M&A data analytics aggregator.

# Immersive Marketing Technology Presents ELEVEN

#### **Product Overview**

ELEVEN is more than an Event Management tool. It is a comprehensive, cloud-based software suite that makes large-scale engagement easy. ELEVEN ensures:

- Higher year-over-year retention
- Stronger ROI for sponsors and exhibitors
- Better control and ability to make real-time adjustments at each event
- Improved networking and event immersion for attendees, exhibitors, presenters and sponsors
- A more impactful and enjoyable overall experience for attendees



Through a fully customizable desktop control panel, ELEVEN allows hosts to be nimbler with their event program and strategy and to make decisions based on information they received just minutes ago. ELEVEN provides a tangible methodology for quantifying management imperatives.

Correspondingly, ELEVEN equips attendees with tangible resources through an interactive mobile experience, clearly demonstrating the value the event provides. But most importantly, ELEVEN directly engages all event participants in a measurable way.

#### Truly engaged participants are an organization's most meaningful assets.

#### What Sets Us Apart

ELEVEN takes event management technology beyond simple process automation and increased efficiencies. We provide a truly interactive experience for the audience AND offer event planners with insights that can actually drive more revenue with real-time, immediately actionable data

#### **Target Customers**

TIER ONE	TIER TWO	TIER THREE
Associations	Convention Centers	Higher Education Institutions
Large Enterprises	Large Hotels	Government
Tradeshow Companies	Meeting Venues	Military

#### **Funding Plan**

	2016	2017	2018	2019
Revenue Projections	\$0	\$1,686,780	\$4,396,518	\$7,204,244
Expected Spend*	\$107,885	\$2,156,477	\$3,522,308	\$4,790,071
Funding Requirements	\$125,000	\$500,000		

<sup>\*</sup>Includes full-time staff

Our goal is to raise \$500,000. It will be used for continued platform development and enhancement, adding full-time sales personnel, production specialists and marketing staff.

Our initial sales efforts will target corporate entities and large, membership-led associations. We expect a minimum of 60% repeat engagement, as the volume of collected data from an organization's initial experience with ELEVEN can be used to run more successful and cost effective events down the road. This sustainable sales model allows for an expedited effort embedding the ELEVEN suite with convention centers, large hotels and other meeting venues, providing a predictable month-over-month revenue stream.



#### **MANAGEMENT TEAM**

Todd Mercer Founder and CEO

Kevin Lee Quinn Chief Technology Officer

Bill Collins

Board of Directors, Vice-Chairman

Thomas Egan

Senior Financial Strategist

Amee Singh

Senior Marketing Executive

#### **ADVISORY BOARD**

**Tony Cord** 

Managing Director, Newport Board Group

John Ayers

Founder and CEO, REDLattice

Chaya Merril

Director, Child Health Data Lab, Children's National Health System

Mike McQuigg

Managing Director, The Gladstone Companies

George Korte

Former IBM Business Solutions Manager

Chris Shea

Former Executive Vice President and Director of Marketing, The Washington Speakers Bureau

www.ImmersiveMarketingTech.com • Contact@ImmersiveMarketingTech.com • 703.539.6035

#### Company

Founded: December 2013
Active Operations: March 2015
First Customer: IBTS, October 2015

#### People

Blake Ratcliff: Founder, multiple startups, Founder at Return Property Management, Management team for China Wireless, China Broadcomm, Dyntel, WinStar Wireless. General Electric, Springs Industries, USMC. 1984 USNA

Eric Wallace: CEO, Potomac Waste Disposal, GE Appliance Services, USMC, 1985 USNA

Dale Flippo: Founder / Investor in multiple startups, 4 successful sales, executive for IAP, retired federal executive.

Bertrand Hassani: Chief AAA Risk Officer for Santander Bank, Globally recognized financial and technology executive, investor and technology advisor for IntelliSpeX

#### **Staff**

18 developers (outsourced), 1 test and help desk, 3 management

#### Governance

Nevada LLC, converting to C Corp in January 2017. Major activities in DC Metro, NYC, and Texas

#### **Financials**

Revenue – 1<sup>st</sup> committed revenue client, Oct 2016 Projected 2017 Revenue -\$0.288 Million Projected 2018 Revenue - \$2.652 Million

#### **Funding**

Bootstrapped by founder, approximately \$100,000 friends and family, \$30K bridge debt

#### **Pipeline**

1 active enterprise client-potential for 100+ seats by year-2017

Trials in Discussion - NY Weatherization, Department of Energy, NYC Housing Authority, AECOMM, Gilbane, Jacobs, NYC DEP

#### Ask

**Debt** - \$220,000, 10.25%, 2 year term, bi-annual payments

Equity - \$2.5 million at \$10 million pre-money valuation, board seat, full rights



IntelliSpeX is a Mobile Application collapsing construction operations task work flows. The app provides a multimedia, near real-time, field communication optimized, collaborative tool, and collaborative records (time/date stamped or geo stamped) – PATENT PENDNG.

Engineers, trades, architects, construction management, project management, quality control, quality assurance, clients, and regulators respond, resolve issues and determine construction plans in real-time.

Field trials demonstrate days, weeks, months, and extreme cases years can be slashed to small fractions of current timelines. Field trials have shown consistent reductions in labor of greater than 40%, timelines for initial products by 66%, and other reviewers, regulators, etc. by much more dramatic amounts.

#### **Key Differentiators:**

- Many-to-many interaction in near real-time for participants
- Field optimized communication that performs with or without a broadband connection
- The collaborative record with who created the media, time-stamp, geolocation stamp, commenting sources create unique accountability and measurability

#### **Target Market:**

- Construction Industry \$1.1 trillion annually and \$200 billion for fee services. Major players are very large – government
- AEComm, Bechtel, & other engineering firms
- Repurposes for other markets like facilities management or public works

#### **Traction:**

- Strong presence to Texas Counties, Houston
- NYC DEP using, NYC Housing reviewing, and other NYC agencies
- Engineering and support company with demos and pilots in progress or planned with IBTS, AEComm, Gilbane, Jacobs
- Department of Energy Considering
- NY State Weatherization and Massachusetts
   Weatherization considering

www.IntelliSpeX.com - 1-877-942-6151

#### Scriyb LLC

Christopher Etesse 10900 University Blvd. Bull Run Hall Suite 147 Manassas, VA 20110

Phone: 202-549-7070 Email: c@scriyb.com



Web Address: www.scriyb.com

#### **Management:**

Chairman: Dr. Scott M. Martin CEO: Christopher Etesse CTO: James Casey

**Industry:** Education Technology

**Number of Employees:** 5 FT, 8 PT

Year Company Founded: 2015

Legal Structure: LLC

Law Firm: Sheppard Mullins PLC

Jackson & Kelly PLC

Financing to Date: Private Investors: \$483K

#### **Financing Plan**

Seed Financing: Round Size: \$1mm Round Timing: 4Q 2016

#### **Management:**

Christopher Etesse, President & CEO
6<sup>th</sup> startup, 3 successes, 2 still TBD
CEO, Flat World
SVP Educational Services, Blackboard Inc.
(private to Providence PE)
CTO, Presidium (**Blackboard** acq. \$65mm)
Founder and CEO, Kadoo (sold)
Founding team, #20 at **Blackboard** (IPO)

#### Dr. Scott M. Martin, Chairman

28 years as educator, inventor, administrator, researcher Founding Director, Computer Game Design Program, George Mason University Founding Director, Virginia Serious Game Institute (VSGI)

#### James Casey, CTO

13 years managing product development Producer, Electronic Arts (EA) Design, Mythic Entertainment Faculty, George Mason University MBA, Virginia Tech

#### **Business Description:**

Scriyb is an education technology SaaS product company serving the K-12 and Higher Education markets. Launched in 2015 as a George Mason University spin-out, Scriyb has customer contracts amounting to over \$200k and the platform has been used to teach several hunderds of students.

#### **Value Proposition:**

Scriyb helps solve an important and growing problem in K-12 education: in the STEM fields, there are too few certified teachers to teach students. There are 42,000 high schools in the U.S., but only 14,000 certified Computer Science teachers. This teacher shortage prevents states, counties and cities from meeting their STEM education goals. The Scriyb platform solves this problem by enabling one teacher to teach multiple classrooms of students simultaneously. These classrooms can be spread across a school district, and the instructor has the ability to teach the course material to all students while providing classroom-specific assistance to students needing additional help. The Scriyb platform improves academic achievement rates, thus reducing school systems' remediation costs and ensuring re-accreditation.

#### **Company Background:**

Scriyb was born out of the Computer Gaming and Technology Academy at George Mason University in late 2015 to solve a classic supply and demand problem. The academy had over 1000 students enrolled across 4 age groups, but did not have enough teachers or physical facilities to hold these courses. The Scriyb platform was built to meet this immediate need, but the founding team architected a product that would scale and adapt seamlessly to support a diversity of distributed learning needs.

#### **Products/Services:**

Scriyb is a revolutionary cloud-based synchronous education engagement platform that allows a single teacher to effectively instruct thousands of students in real-time without sacrificing quality of instruction or the attention required for each student to master the subjects being taught. Scriyb uses a patent-pending methodology that walls off large number of students into smaller groups, or classes of students, grouped by public and private variables that encourage sociodemographic-based peer-to-peer and social learning cohorts, all under the tutelage of a primary instructor.

#### **Intellectual Property/Special Know-How:**

Using multiple patented and patent-pending algorithms that combine historic game design mechanics, current multi-player gaming communications methodologies, and contemporary peer-to-peer cohort and virtual social learning research, the Scriyb virtual real-time streaming educational engagement platform seeks to improve educational retention and academic outcomes for students from diverse cultural and social-economic communities worldwide.



#### address

9812 Falls Rd., Suite 114-156 Potomac, MD 20854

tel 301 960 3405 fax 301 960 3318

#### Sparo Executive Summary

#### Company Mission

Create a global e-commerce play that helps online and offline merchants grow by leveraging corporate social responsibility.

#### **Company Business**

Sparo's patented tool allows merchants to increase brand loyalty, decrease cart abandonment and grow their business by marrying e-commerce and charity at the checkout page. Sparo has a java script that can be embedded onto the shopping cart of any merchant anywhere in the world. The app allows shoppers to select their favorite charity at checkout.

#### Company Revenue Goal

Become a \$355 million annual revenue generating company by capturing 0.5% of the global e-commerce market of \$3.55 Trillion by 2019.

#### Company Business Model

Sparo collects a 2% fee from every successful sale it generates for its merchant partners. For example, if a shopper buys \$1000 worth of goods from a Sparo merchant Sparo collects \$20.

#### Company Structure

- a. Rob Sobhani, Ph.D. Founder & CEO
- b. RepEquity Digital & Social Marketing
- c. Exygy Minority owner & Technology Partner

#### Company History & Milestones

- a. Launched in mid-2013
- b. Signed up its merchant in 2014
- c. Signed up over 100 charity partners with 12 million donors in 2015
- d. Became a technology partner of Magento in 2015
- e. Received funding from the State of Maryland in Feb. 2016
- f. Received its fifth patent in May 2016
- g. Received funding from a high net worth individual in June 2016
- h. Signed its 10th merchant partner in July 2016.

#### WORLD'S REGISTRY OF NEW IDEAS



#### receive RECOGNITION for your IDEAS & DISCOVERIES

**Mission**: Provide Innovators & Scientists of the world with an easy to use and fair on-line system for securing CREDIT and receiving RECOGNITION for their Ideas & Discoveries.

**The need addressed**: Recognition is essential for the career of scientists. The traditional way to secure recognition for ideas & discoveries, publishing in academic journals, is slow, cumbersome, ineffective, and marred by unfairness (biased to favor influential academics). Thus, there is a need for better ways to secure credit & recognition for ideas & discoveries.

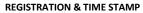
**Solution**: We provide an online CERTIFICATION SYSTEM where the scientists, innovators and creators of the world can secure various levels of ownership for their Ideas & Discoveries. The system is based on NOVEL concepts invented by founders and validated by peer review (Oxford Journal of IP) and patents. Our system brings together the new ideas & discoveries of the world into ONE CENTRALIZED DATABASE – valuable asset (unlike the 50,000 different journals).

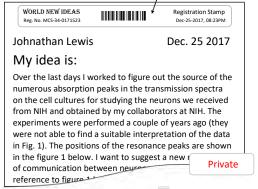
**Market**: Global Reach Service. The Registry is particularly useful to the LESS-INFLUENTIAL scientists & creators of the world: students, junior scientists, innovators in high potential developing countries (e.g. India, China, Brazil, ¾ of the world). At maturity, 5-10 years, we will have about 400 million users worldwide and 10 million "fee payers" (publication fees for priority-claims). Customer acquisition will be performed via Local / Global "New Idea Competitions" where participants will submit ideas as priority-claims by using our system.

**Predicted Revenue & Profit**: We estimate that at maturity, 5-10 years, the service will bring \$2 billion - \$5 billion in revenue per year. Most of the revenue will be made via fees publication fees for priority-claims (high profit margin).

**Our Team:** Jerry Comanescu, PhD–Esq is a former physicist and patent attorney. Jerry is the author of the Oxford Article disclosing the concepts on which this service is based. Teodor Tecsa, PhD is a senior software development manager with startup experience. Bogdan Neculaes, PhD is an experienced technology portfolio leader.

#### CERTIFICATION / OWNERSHIP levels for Ideas & Discoveries







Discovery of a new mechanism involved in the communication between neurons

Jonathan Lewis

I claim: an idea for an experiment and the first discovery of a new mechanism involved and controlling communication between neurons. The mechanism includes three different electric signals. The first on is applied to the sides of the synapses, the second is applied.



**Public** 



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Jerry Comanescu, PhD – Esq. 202-754-2064 comanescu68@gmail.com



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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 cuttingedge 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 17 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.



#### **BDO** @bdoaccountant

For more than 100 years, BDO USA has been recognized as a premier accounting, tax, financial advisory and consulting organization. Providing services to a wide range of publicly traded and privately held companies, BDO offers a sophisticated array of services and global capabilities, combined with the personal attention of experienced and committed professionals. Founded 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.

WER
Wilson Sonsini Goodrich & Rosati

#### 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.



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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 Chesapeakeregion 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.



#### **CRESA** @DCCresaPartners

Cresa is the largest tenant only commercial real estate firm in the world. We represent a large number of technology clients globally such as, RSA, Oracle, VMWare, EMC, Twitter, and Science Logic to name a few. Cresa delivers a fully integrated platform of tenant specific services created to best support emerging technology companies.



#### JAMES M UNDERHILL, CHIEF EXECUTIVE OFFICER

Jim is the CEO of Cresa, the largest commercial real estate tenant advisory firm in the world. The company has offices in over 70 cities worldwide, and is known for client advocacy, thought leadership and analytics, and a special culture from being a 100% employee owned company.

Jim's focus as CEO is on expanding the firm's capabilities in key markets, growing its global footprint, and continuing investment in its advisory and service line capabilities. Jim was most recently the CEO of the Americas with Cushman & Wakefield, where he was responsible for a \$1.2 billion operating budget and over 10,000 employees. Previously Jim was the Founder and President of The Staubach Company - Northeast, which became the largest region in the company before its sale to JLL. He has negotiated transactions with a combined value in excess of one billion dollars for organizations such as Booz Allen & Hamilton, The Nature Conservancy, MCI and The World Wildlife Fund.

Jim has served on the Boards of numerous charitable organizations, including Junior Achievement, The Wolf Trap Foundation for the Performing Arts, Neediest Kids, the National Rehabilitation Hospital, and the Chesapeake Bay Maritime Museum. He is a member of the World Presidents Organization, and the Economic Club of Washington.

Jim received his MBA degree from Harvard Business School and has taught at Harvard College. He holds a Bachelor of Science degree from Washington & Lee University, where he recently served on the Williams School Board.



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#### **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.



#### **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.



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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.



#### THE CAPITOL BAY GROUP AT AMERIPRISE FINANCIAL

The Capitol Bay Group at Ameriprise Financial Services, Inc. provides financial planning and wealth management services for middle market business owners and corporate executives. Middle market business owners and corporate executives can have many responsibilities and very little time. You need someone who is knowledgeable, sees the big picture, and focuses on the details.

We believe are that clients should have their portfolios aligned to their required returns determined from individualized financial plans and risk tolerance levels. We keep your fees competitive and employ active tactical asset allocation to ultimately drive asset class returns.

We work with Certified Financial Planners and other professionals within and outside of Ameriprise to help our clients reach their goals. These professionals include but are not limited to: Attorneys, CPAs, investment bankers, valuation experts, business advisors, commercial bankers and brand managers.



#### JOHN YETMAN, CIMA®, FINANCIAL ADVISOR & MANAGING DIRECTOR

John is a founding member of The Capitol Bay Group. He has 33 years of experience in the financial services industry working with major investment firms including: Ameriprise Financial, Morgan Stanley Smith Barney, UBS, Wachovia, Shearson Lehman Brothers and Johnston, Lemon & Company.

John has conducted numerous educational seminars for major corporations and organizations, including: IMF, The World Bank, The Organization of American States, Discovery Channel, GE. and many others. He has also hosted Mid-Day Money Talk on WRC Radio. John received his Certified Investment Management Analyst® (CIMA®) certification from the Wharton School of Business. He graduated from the University of Maryland with a degree in accounting. He holds numerous registrations including, FINRA Series 7, 8, 63, 65, and Insurance for 31 states.

John is a past member of the Board of Governors of Opportunity International, which helps entrepreneurs in poverty stricken areas globally. He is also on the Board of Advisors for The House – A Place for Youth in Anacostia, DC. John resides in Bethesda, Maryland with his wife Dina and his sons Jack and Jamie.



#### **SPONSORS**



#### **MGA**

Based in Washington, DC, MGA is a full-service tenant representation firm focused on providing a national, highly-diverse client base with expert consultation in analyzing and executing solutions to minimize the clients' costs of their business facility, while maximizing workplace efficiency and productivity. As our clients will attest, MGA's proven, non-traditional, proprietary, step-by-step process consistently produces tremendously successful results.

MGA has dared to be different than others in the marketplace, setting a new standard of tenant representation services. Establishing and preserving the integrity of the firm is of the utmost importance to each of the professional members of the MGA team, which comprises partners, consultants and brokers, as well as a highly-skilled team of legal, accounting, marketing and IT personnel. MGA consistently performs at the highest level in order to provide an unparalleled level of service to its clients.



#### MICHAEL A. GOLDMAN, PRESIDENT AND FOUNDER

Michael A. Goldman, President and Founder of MGA, Inc. is a Washington, DC native who specializes in strategic tenant consulting services. In 2010, after numerous years within the commercial real estate industry, he established MGA. Through the founding of MGA, Michael reaffirmed his strong commitment to providing clients with the highest level of personalized attention and true business consulting services. Michael brings with him a proven track record of excellence and success, as well as a reputation for professionalism, integrity, service, and commitment to his clients' needs.

Prior to forming MGA, Michael worked as a Director in Newmark Knight Frank's Washington, DC office where he represented tenants across the United States. He also spent the first several years of his career as an Associate Vice President at The Ezra Company, where he helped redesign the company's Proposal of Services and assisted in the implementation of a new training & mentoring program.

Michael graduated from The George Washington University (GWU) where he earned a Bachelor of Science degree in Business Administration. He received an athletic scholarship to play soccer at GWU, and was captain of the GW men's soccer team for four years.



#### THE MELTZER GROUP @MeltzerGroup

MELTZER GROUP

The Meltzer Group is a diversified financial services company based in Bethesda, Maryland. Meltzer has become industry leaders in the insurance field as sited by the Washington Business Journal, providing comprehensive business, personal and corporate insurance and financial strategies. Founded in 1982, The Meltzer Group prides itself in providing clients exceptional service and innovative problem solving ideas. They believe that the clients' needs and desires are the most important factors in the insurance process.



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#### **RICHARD DIPIPPO, PARTNER**

Rich DiPippo works with business owners, key executives, and families to help clarify their objectives and take action. Rich believes in a holistic approach to planning and works with many local attorneys, CPAs, and wealth management advisors to guide clients through the planning process. Rich is a 1979 graduate of The George Washington University. Following graduation, he served as the Academic Coordinator for GWU athletics and as an assistant baseball and wrestling coach.

Rich joined New York Life in 1985 as an agent and became a member of the NYL Chairman's Council, representing the top 1% of all agents his last 11 years with the company. He was also chosen for the company's Agents Advisory Council, and served as the Chairman of the Life and Long Term Care Committee. In 1998, Rich formed RCD and Associates, a full-service insurance and planning firm. RCD then merged with The Meltzer Group in 2008.

Rich and his wife Molly reside in Silver Spring, Maryland, along with their daughter Carmen. He is an active supporter of GWU athletics, and also enjoys golf, and coaching his daughter's basketball and softball teams. Rich has been a member of the Washington Wrestling Officials Association since the early 90s, officiating county, regional, and state tournaments.

### WHEELS UP WHEELS UP

Wheels Up is a membership-based private aviation company that significantly reduces the cost of flying privately while providing unparalleled flexibility and service.

Unlike with traditional fractional or jet card programs, joining the Wheels Up club does not require a significant up-front financial or long-term commitment. You aren't purchasing an asset, you are joining a club. For a reasonable initiation fee and low annual dues, you become part of an exclusive private aviation network, providing aircraft at reduced rates with guaranteed availability. A Wheels Up membership means:

- Guaranteed occupied hourly pricing on a pay-as-you-fly basis, paying only for hours flown
- No hidden charges or unnecessary management or service fees
- Exclusive access to a private fleet of brand new King Air 350i and Citation Excel/XLS aircraft
- Experiencing the renowned Wheels Down lifestyle, events, concierge and partner benefits program



#### GREG FOSCATO, REGIONAL VICE PRESIDENT

As a Wheels Up Regional Vice President, Greg Foscato is responsible for driving revenue growth and brand awareness for Wheels Up throughout the Mid-Atlantic Region. Prior to joining Wheels Up, Greg was a Senior Manager with The Washington Nationals Baseball Club and was tasked with increasing revenues through sales of corporate sponsorships, club and suite products. Greg began his career in professional sports with the Nationals as a Season Ticket Service Representative before transitioning into a Group/Season Ticket Account Executive.



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Following his graduation from George Washington University, Greg was commissioned an Ensign in the United States Navy. Upon commissioning, Greg reported to Surface Warfare Officer School in Newport, Rhode Island before reporting as the Anti-Submarine Warfare Officer aboard USS Stark (FFG-31). Following this tour, Greg assumed the role of Tomahawk Missile Strike Officer aboard USS Roosevelt (DDG-80). Greg's final tour in the Navy took place while serving as a Flag Lieutenant in the Pentagon.

Upon leaving the Navy, Greg became a Military Systems Engineer for Anteon, supporting NAVSEA at the Washington Navy Yard, for over two years before returning to George Washington University to earn a Master's Degree in Sport Management. Greg enjoys golf, running, traveling and spending time with his family.



#### 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.



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# 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 Dingman, Elana was 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. 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 financial services, government and natural resources.

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



#### 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 is 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.



#### **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.



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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, excellence in sales 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.



#### ANNUAL WHARTON DC INNOVATION SUMMIT

The 4th Annual Wharton DC Innovation Summit, to be held in April 2017, will bring together investors, innovators in industry and government, policy makers, entrepreneurs, academic leaders and others. The Summit has earned a reputation as a high value, high impact way for entrepreneurs, business executives, government officials and others dedicated to become more successful leaders by leveraging the power of innovation.

The DC Summit will provide an interactive environment to help you find public and private sector partners with the resources and interest to help you succeed as an innovator.

The Summit has attracted over 1,100 attendees (representing over 250 private and public organizations) who are eager to listen and interact at a full day of keynote and other sessions, networking breaks and a concluding reception.



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#### ALI QURESHI, PROGRAM DIRECTOR @aliq21

Ali brings two decades of experience assisting Federal Government and commercial clients in meeting their technology services needs through innovative solutions. Ali is currently the Program Chair for the Annual Wharton DC Innovation Summit, and recently elected to the Board of Directors for the Wharton Club of DC. Ali served as VP of Consulting Services, where he was responsible for the organization, development, and management of Xcelerate's delivery team. He led the strategic development efforts that helped the company achieve 35% annual growth year over year. Prior to Xcelerate, Ali had leadership experience in a number of healthcare technology companies serving Federal, private, and international customers. He was CTO for RF Telematics.

Ali also served 8 years in the Office of the Chief Administrative Officer for the U.S. House of Representatives in a variety of technology leadership positions. Ali had a successful consulting career supporting projects that focused on environmental policy, telecommunications, strategic sourcing, and healthcare with Booz Allen Hamilton and Accenture. 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. He is a long time resident of Northern Virginia and currently resides in Ashburn, VA with his wife and two children.



#### 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.



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### THE TECH COUNCIL OF MARYLAND'S (TCM) VENTURE MENTORING SERVICE (VMS)

VENTURE MENTORING SERVICES The Tech Council of Maryland's (TCM) Venture Mentoring Service (VMS) program is based on a team mentoring approach modeled after the highly-successful MIT Venture Mentoring Service, which has been implemented in more than 60 communities around the globe; the TCM VMS program is the 50thprogram. The TCM VMS program is currently serving 14 Maryland-based startup companies, which have a nexus to Maryland and a demonstrated proof of concept for their respective product or service.

The TCM VMS program has provided over 520 hours of volunteering and free mentoring. We have ongoing partner relationships with CONNECTpreneur and the Montgomery County Economic Development Corporation. Sponsors include Greenberg Traurig, the Maryland Department of Commerce, Baker Tilly, Launch WorkPlaces and MCEDC. For more information, go to www. techcouncilmd.com/careers/mentor-about.php



### SALLY STERNBACH, FOUNDER OF TCM VENTURE MENTORING SERVICES

Sally Sternbach retired in 2016 after leading both the Montgomery County Department of Economic Development and Rockville Economic Development, Inc. for 14 years. In her prior professional life, Sally spent 19 years with AT&T federal sector, taught accounting and finance, 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. She is married to David Sternbach, a former professional musician turned clinical social worker and author of more than 100 articles on performance psychology; they have lived in Montgomery County since 1980.

#### **CONNECTpreneur Forum, December 14, 2016**

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Neil Kleinberg Founder & CEO Diliver LLC Mike Montera CFO Diliver LLC Shaun Harrahan COO Diliver LLC  Immersive Marketing Technology Todd Mercer CEO & Founder Immersive Marketing Technology Kevin Quinn Chief Technology Officer Immersive Marketing Technology Amee Singh Senior Marketing Executive Immersive Marketing Technology  IntelliSpeX Blake Ratcliff Founder IntelliSpeX Dale Flippo Founder IntelliSpeX Eric Wallace CEO IntelliSpeX  Scriyb  Scriyb  Scriyb  Christopher Etesse President, CEO & Co-Founder Scriyb Scott Martin Chairman & Co-Founder Scriyb  Sparo Corporation Rob Sobhani Founder & CEO Sparo Corporation  World's Registry of New Ideas Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas Helle Goldberger Advisor World's Registry of New Ideas  ATENDES First Name Last Name Title Company Jonathan Aberman Managing Director Amplifier Venture Partners Steve Abramowitz CEO CEO Goardroom Bhoj Adhikari Founder Imman Aftab CEO 10Pearls		Wolf		
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Kevin Quinn Chief Technology Officer Immersive Marketing Technology Amee Singh Senior Marketing Executive Immersive Marketing Technology  IntelliSpeX  Blake Ratcliff Founder IntelliSpeX  Dale Flippo Founder IntelliSpeX  Eric Wallace CEO IntelliSpeX  Scriyb  Scriyb  Christopher Etesse President, CEO & Co-Founder Scriyb  James Casey CTO & Co-Founder Scriyb  Sparo Corporation  Rob Sobhani Founder & CEO Sparo Corporation  World's Registry of New Ideas  Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas  Helle Goldberger Advisor World's Registry of New Ideas  ATTENDEES  First Name Last Name Title Company  Jonathan Aberman Managing Director Affin  Imman Aftab CEO 10Pearls			CFO & Founder	Immersive Marketing Technology
Amee Singh Senior Marketing Executive Immersive Marketing Technology  IntelliSpeX  Blake Ratcliff Founder IntelliSpeX  Dale Flippo Founder IntelliSpeX  Eric Wallace CEO IntelliSpeX  Scriyb  Christopher Etesse President, CEO & Co-Founder Scriyb  Scott Martin Chairman & Co-Founder Scriyb  James Casey CTO & Co-Founder Scriyb  Sparo Corporation  Rob Sobhani Founder & CEO Sparo Corporation  World's Registry of New Ideas  Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas  Helle Goldberger Advisor World's Registry of New Ideas  ATTENDEES  First Name Last Name Title Company  Jonathan Aberman Managing Director Amplifier Venture Partners  Steve Abramowitz CEO CEO Worling  Moria (CEO Martin) Company  Affiab CEO 10Pearls				
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Sparo Corporation  Rob Sobhani Founder & CEO Sparo Corporation  World's Registry of New Ideas  Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas  Gregg Jackson, Ph.D Professor & Advisor World's Registry of New Ideas  Helle Goldberger Advisor World's Registry of New Ideas  ATTENDEES  First Name Last Name Title Company  Jonathan Aberman Managing Director Amplifier Venture Partners  Steve Abramowitz CEO CEO Boardroom  Bhoj Adhikari Founder Aufin  Imran Aftab CEO 10Pearls				
Rob Sobhani Founder & CEO Sparo Corporation  World's Registry of New Ideas  Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas  Gregg Jackson, Ph.D Professor & Advisor World's Registry of New Ideas  Helle Goldberger Advisor World's Registry of New Ideas  ATTENDEES  First Name Last Name Title Company  Jonathan Aberman Managing Director Amplifier Venture Partners  Steve Abramowitz CEO CEO Boardroom  Bhoj Adhikari Founder Aufin  Imran Aftab CEO 10Pearls	James	Casey	CTO & Co-Founder	Scriyb
Rob Sobhani Founder & CEO Sparo Corporation  World's Registry of New Ideas  Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas  Gregg Jackson, Ph.D Professor & Advisor World's Registry of New Ideas  Helle Goldberger Advisor World's Registry of New Ideas  ATTENDEES  First Name Last Name Title Company  Jonathan Aberman Managing Director Amplifier Venture Partners  Steve Abramowitz CEO CEO Boardroom  Bhoj Adhikari Founder Aufin  Imran Aftab CEO 10Pearls				
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Jerry Comanescu, PhD-Esq. Founder & CEO World's Registry of New Ideas Gregg Jackson, Ph.D Professor & Advisor World's Registry of New Ideas Helle Goldberger Advisor World's Registry of New Ideas  ATTENDEES First Name Last Name Title Company Jonathan Aberman Managing Director Amplifier Venture Partners Steve Abramowitz CEO CEO Boardroom Bhoj Adhikari Founder Aufin Imran Aftab CEO 10Pearls				
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JonathanAbermanManaging DirectorAmplifier Venture PartnersSteveAbramowitzCEOCEO BoardroomBhojAdhikariFounderAufinImranAftabCEO10Pearls	ATTENDEES			
SteveAbramowitzCEOCEO BoardroomBhojAdhikariFounderAufinImranAftabCEO10Pearls	First Name	Last Name	Title	• • •
BhojAdhikariFounderAufinImranAftabCEO10Pearls	Jonathan	Aberman	Managing Director	Amplifier Venture Partners
Imran Aftab CEO 10Pearls	Steve	Abramowitz	CEO	CEO Boardroom
Imran Aftab CEO 10Pearls	Bhoj	Adhikari	Founder	Aufin
		Aftab	CEO	10Pearls
,	Kathy	Albarado	CEO	Helios HR

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Camille	Alexander	Senior Director	BNY Mellon Wealth Management
Scott	Allan	Student	American University
Moss	Amer	Venture Capitalist	Maryland Venture Fund
Karuna	Ammireddy	сто	Pype Inc.
Mark	Andersen	Assurance Partner	BDO USA, LLP
David	Anderson	President	Prestructure
George	Aposporos	Advisor	KinoMetrix
Tobias	Armour	Associate Community Managers	WeWork
Alex	Asbill	Senior Associate	Duff & Phelps
Ethan	Assal	Managing Partner	CYwP Fund
Hilton	Augustine, Jr.	Entrepreneur-in-Residence	Dingman Center for Entrepreneurship
Michael	Avon	Founder & CEO	ICX Media, Inc
John	Ayers	Founder & CEO	REDLattice
Laura	Baalman	CTO	Povigy
Bronwyn	Bailey	Vice President	Private Equity Growth Capital Council
David	Bain	President	TM Technologies, Inc
Bryan	Baird	CEO & Founder	xagent
Don	Baker	Chief Funding Guide	Funding Trek
Steve	Balistreri	Director	Deloitte
Dyann	Barnes	Senior Manager	RSM US LLP
Henry	Barratt	Consultant	Capital Source Business Finance Group
Ed	Barrientos	President & CEO	Brazen Careerist
Tim	Batchelor		White Peak Capital
Fernando	Batista	Managing Director COO	InvestUSC LLC
Paul		CEO	
Nick	Battagllia	CEO	Fledge Connect, Inc.
	Bawa		Covintus
Michael	Beck	Angel Investor	Commentation Hairmanite.
Paula	Bejarano	MBA Student	Georgetown University
Andrew	Berkowitz	COO	Tradeversity
Karen	Berliner	Special Asst. for Biological Resources	National Cancer Institute
Marc	Berman	President & CEO	Vector Talent Resources
Marlon	Bernal	Assurance Senior Manager	BDO USA, LLP
Gustavo	Bessalel	CFO	Fugue, Inc.
Randy	Blake	Principal	Duncaster Investments
James	Во	Founding partner	TsingSun Capital
PV	Boccasam	Partner	Novak Biddle Venture Partners
Richard	Bodson		
Gore	Bolton	CEO & Founder	Piranha Tank
Candan	Bolukbas	CTO & Co-Founder	NormShield, Inc.
John	Boozer	Senior Sales Lead	WeWork
Quinton	Bowman	Investor	
Mary	Brady	Executive Director	Economic Club of Washington
Steve	Britt	Director Corporate & Technology Law	Berenzweig Leonard, LLP
Gil	Brodnitz	Managing Partner	Groundswell Strategies
Linda	Broenniman	President/CEO	RadiateBuzz, Inc.
Charles	Brooks	Vice President	Sutherland Government Solutions
Danai	Brooks	President	Glen Echo Capital
Kate	Bryden	COO	Povigy
Peter	Buchanan	Managing Director	Ten Mile Square Technologies
Margaret	Burcham		
Sheila	Burgess	CEO & President	Intufo, LLC.
Casey	Burton	Event Sales Manager	Topgolf
French	Caldwell		MetricStream
Jim	Cannaday	Director, Business Development	RSM US LLP
Jane-Scott	Cantus	Managing Principal	The ILEX Group
Rich	Carlson		1962
John	Casey	Managing Director	Venture Mentors LLC
Alex	Castelli	Partner	CohnReznick
Stuart	Chandler	CEO	Optivor Technologies
Debra	Chandler	CEO	Kickfannie / KF Media Group
Jouky	Chang	Managing Director	Duff & Phelps
Jay	Chapel	CEO & Co-Founder	ParkMyCloud
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ATTENDEES			
First Name	Last Name	Title	Company
Yonald	Chery	СТО	Data Tribe
Erica	Cheslock	Development Officer	Eisenhower Fellowships
Jim	Chung	Research, Innovation & Entrepreneurship	GW University
George	Churchwell	Co-Founder & President	Tech 2000 Inc.
Lisa	Cines	CEO	Cines Consulting
Paul	Cinquegrane	Managing Director	Bison Clover Associates
Angela	Clark	Director	Nat'l Found. for Acquiring Employable Skills
Derek	Coburn	CEO and Co-Founder	Cadre
Dan	Coffing	President	OrchIS.io
Matthew	Colbert	Founder & CEO	Spend Consciously
Bill	Collins	Chairman & CEO	The Collins Companies
Christine	Copple	COO	ETX Pharma
Jim	Corcoran	CEO	Northern Virginia Chamber of Commerce
		Chairman	
Tony William	Cord		Aspire & Immersive Marketing
	Cosgrove	Owner	Numategy
Judy	Costello	Director, Office of BioHealth & Life Sciences	Maryland Department of Commerce
Albert	Costilo	VP Business Development	Sales Force Europe
Scott	Cotter	President	Trident Growth Group
John	Cronin	CEO	OpCenter, Inc.
Jessica	Crytzer	Vice President	Cresa
Lily	Cua	COO	Aspire
Jack	Daggitt	Partner	XOL Ventures
Carmine	d'Aloisio	Senior Innovator in Residence	AU Center for Innovation in the Capital
Thomas	Dann	Managing Director	Castlehaven Advisors, LLC
Christina	Davies	Partner	Cornerstone Development Group
Dario	Davies	Partner	Cornerstone Development Group
Rusty	Davis	Principal	Davis & Associates, P.A.
Hunting	Davis III	Investment Management	Raymond James
Hank	Dearden III	Principal	Group 3D
Dennis	Defensor	SVP	ORock Technologies
Taylor	Devine	Founder & Managing Partner	The CDI Group
Mahesh	Dhillon	Principal Principal	Witan Partners LLC
Fred	Diamond	Founder	Institute for Excellence in Sales (IES)
Brian	Dickerson	Senior Associate	West, Lane & Schlager
John	Dierkes	Managing Director	Pickwick Capital Partners
			·
Gian	Dilawari	President	Dilnet, Inc.
Bob	Dinkel	Director	Pierce Capital Partners
Rich	DiPippo	Partner	The Meltzer Group
Sarah	Djamshidi	Managing Partner	Speedshift Ventures
Douglas	Doan	Angel Investor	Hivers & Strivers
David	Dolton	Partner	Perthera
Randy	Domolky	Managing Director	Private Access Network
Sunil	Dorairajan	CEO	Pype Inc.
Kyle	Downey	Co-Founder	Home Front Security and Benefits
Amanda	Ducey	Account Executive	SmartCEO
Daphne	Dufresne	Managing Partner	JBD Holdings
Thomas	Durrer	Senior VP	Xenith Bank
Cook	Edens	Chief Operations Officer	The Edens Group
Thomas	Egan	President	The Cahernane Group
Gerard	Eldering	President	innovatetech
Grant	Elliott	CEO	Ostendio, Inc
Gail	Embt	CEO	KinergyHealth.com
Nat	Emery	CEO	LearnSpectrum
Jay	Emmanuel	Chief Architect	Data Tribe
JD	Englehardt	MSB student	Georgetown University
Mark	Esposito	Business Development Executive	Ernst & Young
Hi	Ewald	·	Tall Oaks Capital
Obi	Ezebuiroh	Managing Partner Founder & CEO	·
			Cherry Ivy, Inc.
Sonja	Faison	Private Wealth Manager	Merrill Lynch Wealth Management
		Cl	D. I.I. C. I. M. C.
Ken	Falke	Chairman	Boulder Crest Military & Veteran Retreat
		Chairman President General Manager	Boulder Crest Military & Veteran Retreat  The Echo Group  DC Inno

ATTENDEES			
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Spencer	Finch-Batista	Advisor	InvestUSC LLC
Hudson	Finch-Batista	CEO	InvestUSC LLC
Elana	Fine	Executive Director	Dingman Center for Entrepreneurship, UMD
Dwight	Fischer	Executive Vice President	Lore Systems Inc
Matt	Fischer	CEO	Control A+
Mary Ellen	Fitzpatrick	Financial Advisor	Wells Fargo Advisors
Sharon	Flank, Ph.D.	CEO	InfraTrac
Ryan	Forsythe	CEO	Qlipt
Greg	Foscato	Vice President	Wheels Up
Marc	Freedman	Certified Expense Reduction Consultant	Expense To Profit, LLC
Lisa	Freeman		DDS
Scott	Friedlander	President Worldwide Sales & Marketing	MarketResearch.com
Alan	Friedman	Managing Principal	Focus to Win Business
Dan	Frumkin	CSO and co-Founder	RadiateBuzz, Inc.
Jeffrey	Furst	CFO	Summer Financial Services
Robert	Gahagan	President & CEO	Corporate Consulting Services Inc
Brian	Gaister	Principal Principal	Pennington Partners & Co
Danielle	Gallo	Manager	Ryan & Wetmore
J.S.	Gamble	Managing Principal	Blu Venture Investors LLC
Guillermo	Garria	Account Vice President	UBS Financial Services
Magaly	Garza Gatto	Bus. Dev. Mgr., Global Public Sector	Amazon Web Services
James		Managing Member	T2P, LLC
Valerie	Gaydos	Founder, President & CEO	Capital Growth, Inc.
Marc	Geffroy	Principal	Seneca Properties
Harry	Geller	Entrepreneur in Residence	UMD, RH Smith School of Business
Nicole	Geller	Private Investor	
Emily	Giacomini	Associate Director	MBA Career Coaching
David	Giannini	Executive Chairman	CirrusWorks
Zachary	Giegel	Co-Founder	GSP Financial Services
Mark	Gilbert	Financial Advisor	Han Group at UBS Financial Services
Sean	Gillispie	Co-Founder	Stratasense LLC
Gina	Gin	Partner	PricewaterhouseCoopers LLP
Kate	Glantz	Founder & CEO	Heartful.ly
Adam	Goddard	Managing Director	Capitol Bay Group, Ameriprise Financial
Thomas	Godin	COO	Gorove/Slade Associates, Inc.
Josh	Goldberg	Director of Strategy	Boulder Crest Military & Veteran Retreat
Alan	Golden	Business Manager	Apple
Michael	Goldman	President	MGA, Inc.
Don	Goodwin	Chief Marketing Officer	YYOTTA LLC
David	Gorodetski	Founder & COO	Sage Communications
Becky	Graham	Director of Business Development	Northern Virginia Chamber of Commerce
Jennifer	Graham	VP of Marketing	Kastle Systems
Carl	Grant	EVP, Business Development	Cooley LLP
Steve	Graubart	CFO	1776
Ellen	Grealish	Co-Founder	FlexProfessionals, LLC
Mark	Greathouse	Managing Director	Mid-Atlantic Angels Corporation
Abe	Green	CEO	AGT
Richard	Greene	CPA & Business Advisor	RGA Business Advisory
Ingar	Grev	Managing Director	The Growth Coach
Philip	Gross	Managing Director	Expense Reduction Analysis
Thomas	Gross	Attorney/Professor	George Washington University
Susan	Groter	Business Performance Advisor	Insperity
Oleg	Gudym	Senior Engineer	Lore Systems Inc
Fred	Gumbinner	President	FRG Enterprises; Keiretsu Forum
Bramh	Gupta	CEO	RoboMQ.io
Babak	Hafezi	CEO	HafeziCapital International Consulting
Robert	Hagerty	Principal	Farragut Capital Partners, LLC
Kyler	Halat-Shafer	Student	American University
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Are you 100% sure your data is safe?		
Is your network up at least 99.99%?		
Are you 100% happy with your IT?		

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