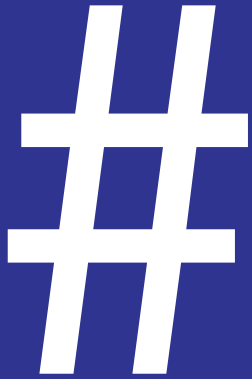


Big Idea  
CONNECTpreneur

BETHESDA FALL  
FORUM

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# AGENDA

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7:00 - 8:15am

## REGISTRATION/NETWORKING

8:20 - 8:30am

## WELCOME

S. TIEN WONG, Chairman, Tech 2000 and Lore Systems

8:30- 9:15am

## FIRESIDE CHAT

Tom Gardner, CEO & Co-Founder, The Motley Fool

9:15 - 9:40am

## COMPANY SHOWCASE/ROCKET PITCH

Aperimics - Crystal Icenhour

Friealtor - Chris Schmidt

Nexus Private Capital - Cort Chalfant

SurgiPrice - Sanjay Prasad

TMF Works - Greg Martz

WalkMyMind - Diana Liberto

9:45- 10:40am

## SERIAL ENTREPRENEURS SHARE WAR STORIES

MODERATOR: MARK WALSH, Serial CEO and investor; ex-Head of the Office of Investment and Innovation, U.S. Small Business Administration

JENNY ABRAMSON, Founder & Managing Partner, Rethink Impact, LP

ZVI BAND, Founder & CEO, Contactually; Co-Founder, ProudlyMadeinDC

KATE GOODALL, CEO, Halcyon

10:45am

## NETWORKING



# WELCOME TO THE **BETHESDA** **FALL FORUM**

Dear Guests:

On behalf of our awesome Sponsors and team, I would like to welcome you to the Big Idea CONNECTpreneur Fall Forum, our 26th quarterly forum in the past 6 years.

CONNECTpreneur inspires and empowers regional entrepreneurs, CEOs, founders, angels, VCs, CXOs, and other business, university, and government leaders by bringing them into one room for meaningful connecting, learning, and deal making.

Our Partners have been terrific and make this event feasible. Their profiles and bios follow in this program book: Lore Systems, Tech2000, Wilson Sonsini, BDO, Montgomery County Economic Development Corporation, Association for Enterprise Growth, TEDCO, Shulman Rogers, The Meltzer Group, BNY Mellon, Georgetown University, Dingman Center for Entrepreneurship, Ryan & Wetmore, Institute for Excellence in Sales, Hafezi Capital, 1776, The Tech Council of Maryland Venture Mentoring Service and Wharton DC Innovation Summit. Thank you so much!

Finally, I want to thank our loyal and extremely hard-working team, Coaches, and volunteers. In particular, I'd like to acknowledge Antonia Chen, Regan Nelson, Drew Zaleski, Kathy Broe, Oleg Gudym, Jack Weinstein, Jiemin Jordan, Babak Hafezi, Bob London, Richard Greene, Ingar Grev, Ines Lebow, Marissa Levin, Mark Andersen, Mark Holloway, and Mike Labriola among many who have helped! Their great work insures that these CONNECTpreneur Fora are the best and most popular events in the Mid-Atlantic region.

Please enjoy the networking, speakers, and presenters, and make some great connections this morning!

Best,

S. Tien Wong  
Chairman  
Tech 2000, Inc. and Lore Systems, Inc.

# Speakers



@TomGardnerFool

## TOM GARDNER, CEO AND CO-FOUNDER, THE MOTLEY FOOL

Tom Gardner co-founded The Motley Fool with his brother David in 1993. He now serves as its Co-Chairman and CEO. In 2014 & 2015, Glassdoor ranked The Motley Fool the #1 place to work in the U.S. for companies with between 250-1000 employees. Tom serves as the lead advisor on Motley Fool One -- the company's all-access service. He manages The Everlasting Portfolio, committed to holding every investment for more than 5 years, and to date has beaten the market soundly since its inception. Tom is a graduate of Brown University.



@tienwong



@stienwong



@stienwong

## S.TIEN WONG, CHAIRMAN, TECH2000 INC, & LORE SYSTEMS

Tien is Chairman of Tech 2000, a national 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 and 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.



@Walsh

## MARK WALSH, SERIAL INVESTOR & CEO

Mark Walsh recently stepped down as head of Investment and Innovation for the Small Business Administration for the Obama Administration. He oversaw all SBIC, SBIR, Accelerator/Incubator and other growth activities at the SBA. That was his first government position. Prior, he had a 30+ year career in technology, media, venture capital, and angel investing. He was CEO of a high growth public company, (VerticalNet NASDAQ: VERT) was a senior executive at GE, AOL, and HBO, and has invested in and/or served on the board of a number of high profile public and private companies, including BlackBoard (NASDAQ: BBBB), Nutrisystems (NASDAQ: NTRI), half.com (Bought by eBay), TheStreet.com (NASDAQ: TST), IndustryBrains (bought by Marchex-NASDAQ: MCHX), Day Software (bought by Adobe) and many, many others. He got into the collision of technology and politics early, serving as the first chief technology advisor to the Democratic Party in 2002, running the internet efforts for the John Kerry presidential campaign in 2004 and was the founding CEO of Air America Radio, which brought Al Franken,

# Speakers

many, many others. He got into the collision of technology and politics early, serving as the first chief technology advisor to the Democratic Party in 2002, running the internet efforts for the John Kerry presidential campaign in 2004 and was the founding CEO of Air America Radio, which brought Al Franken, Rachel Maddow, Marc Maron, and Chuck D (amongst others) to the progressive airwaves. He also served as a venture partner for Revolution, Inc. in Washington, D.C.

He was the chairman of the board of his college alma mater, Union College, of the Entrepreneurial Center at the University of Maryland, and received his MBA from Harvard. He has served on a number of very prominent not-for profit boards, including the Bipartisan Policy Center (where he was chair), the Philadelphia Orchestra, the New York Theatre Workshop and many others.



@abramsonjenny

## JENNY ABRAMSON, FOUNDER & MANAGING PARTNER, RETHINK IMPACT

Jenny Abramson is the Founder & Managing Partner of Rethink Impact. She is a proven executive and entrepreneur having held a range of leadership roles across the impact tech space—in education, personal data, and media. She has been covered in CNN, The New York Times, and The Washington Post, interviewed on Squawk Box, featured at the Code Conference, at the United Nations, and on Capitol Hill, and was named one of Washington's 100 Top Tech Leaders in 2017, Top 40 Under 40 in 2015, and a DC Power Women in Tech in 2014.

Before leading in the venture space, Jenny served as CEO of LiveSafe, a mobile security company focused on preventing school shootings and sexual assaults. She also held significant business roles at The Washington Post, Personal (a data tech company), and The Boston Consulting Group. In the education and social sector, Jenny oversaw the Transformation Management Office for DC Public Schools Chancellor Rhee and served as the Director of Strategy & Development at Teach for America, and sits on four boards.

Beyond her entrepreneurial and executive experience, Jenny has played leadership roles in the investment realm. Most notably, beyond her current fund, she is an Advisory Board member of the Camden Partners Nexus Fund (a Venture Capital fund focused on investing in Maryland-based businesses). She also was selected to be the only Harvard MBA to serve on Harvard's Investment Committee for Shareholder Responsibility.

Jenny received a BA and MA from Stanford, graduating with honors and Phi Beta Kappa, and an MBA with honors and the Dean's Award from Harvard Business School. She was also a Fulbright Scholar focusing on Human Genomics at The London School of Economics.



@skeewis

## ZVI BAND, FOUNDER & CEO, CONTACTUALLY

Zvi Band is the founder and CEO of Contactually, a venture-backed CRM for relationship-based businesses. An accomplished technologist and software leader, he previously led Workstreamer as CTO from its initial product development to acquisition. Prior to Contactually, Zvi ran a software consultancy firm, working for clients such as Ford, NYSE and Volkswagen.

He serves as a mentor to two DC-based incubators—1776 and Acceleprise. He also founded ProudlyMadeinDC to promote DC entrepreneurship. He was named a Washingtonian Tech Titan and member of MindShare. Zvi is a seasoned entrepreneur, developer, strategist, and startup advisor.

# Speakers

He has unique expertise in both technical and non- technical operations. Zvi is an active public speaker, and frequently participates on technology panels at TechCocktail, Word-PressDC, DC PHP, and DC RUG events, to name a select few. He loves solving new problems, and building new products and services.



## KATE GOODALL, CEO, HALCYON

As CEO of Halcyon, Kate Goodall is the driving strategic force behind Halcyon's creative growth. She was instrumental in the development of Halcyon's well-established Halcyon Incubator, the newest creative series Halcyon Stage, and the soon-to-be-released residency-based Halcyon Arts Lab. Goodall's dedicated passion for arts, sciences and social impact lends an objective and unstoppable drive for formulating and executing Halcyon's mission of catalyzing emerging creatives across multiple platforms, ideas and artistic media, striving for a better world.



@goodallkate

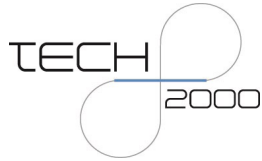
In 2016, Goodall also helped Dr. Sachiko Kuno and Sheila C. Johnson in establishing WE Capital, a consortium of leading businesswomen in the Washington, D.C. region that invests in and supports women and women-led companies, inspiring the next generation of female entrepreneurs while providing opportunity for the investors to achieve their investment goals.

Prior to establishing Halcyon, Goodall served as COO of S&R Foundation, where she developed new programs as well as oversaw impactful and capacity-building partnerships. Goodall hails from the museum field and has worked previously at the Association of Science-Technology Centers, American Association of Museums and the Naval Historical Center, to name a few.

Goodall leads the DC Innovation and Technology Inclusion Council's Economic Development and Entrepreneurship Subcommittee, and serves on the Board of Directors for the Georgetown Business Improvement District. She was a judge for WeWork's inaugural Creator Awards, the Gifted Citizen prize at Ciudad de las Ideas, and MIT Technology Review's Innovators Under 35 Europe Awards. Goodall has also served on Independent Sector's emerging leaders council, was listed in the Washington Business Journal's Power 100 (2016) and 40 Under 40 (2017), and was named one of Washingtonian's 2017 Tech Titans.

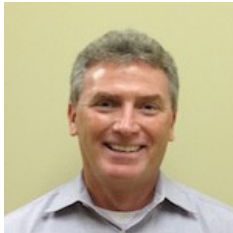
Goodall earned her B.A. in world literature and M.A. in nautical archaeology. She enjoys sailing, snorkeling, hiking, marksmanship, good food and playing with her two sons.

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## TECH 2000, INC @TECH2000INC

Tech 2000 is an award-winning EdTech, corporate training and education software development 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, and serves Fortune 1000 enterprises.



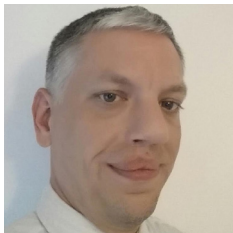
## KEVIN MARZ, DIRECTOR

Kevin Marz is the director of Tech2000, a training delivery, eLearning development and learning analytics company based in Herndon, VA. Tech2000 is an authorized learning and development partner of Cisco, Metro Ethernet Forum, Apple and many other notable technology companies. Kevin has over 30+ years of delivering multi-million dollar sales growth and winning business development initiatives for start-up, turnaround, and high-growth operations.



## 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."



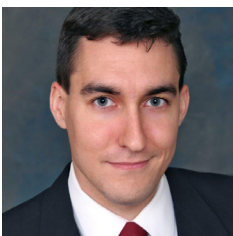
## ANDREW ZALESKI, VP AND DIRECTOR OF INFORMATION TECHNOLOGY

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 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.



## 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.

# Sponsors

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

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



## MONTGOMERY COUNTY ECONOMIC DEVELOPMENT CORPORATION

The Montgomery County Economic Development Corporation (MCEDC) is the official public-private organization representing Montgomery County, Maryland. Our team is to help businesses start, grow and exceed expectations by helping them gain access to prime locations, top talent and available capital. With proximity to Washington, D.C. and 18 major federal agencies, Montgomery County is a global innovative center for industries ranging from life sciences and IT to cybersecurity and hospitality. The county is an economic leader in Maryland and a premiere address for the Mid-Atlantic's robust business community. Top talent lives here – Montgomery County has the nation's highest percentage of residents holding post-graduate degrees. It's also a great place to live and work.



## DAVID PETR, PRESIDENT & CEO, MONTGOMERY COUNTY ECONOMIC DEVELOPMENT CORP.

David Petr is the first President and CEO of the Montgomery County Economic Development Corporation, a new public-private venture in the region. Petr joins the MCEDC from the Central Florida Development Council, Inc. where he was the President and CEO. He successfully transitioned the organization from a public/private partnership to a private organization, while achieving record-setting job creation and capital investment results during his tenure. His unique talents in organizational transformation and team building while running a high-performing economic development program will align well to the immediate and long-term needs here in Montgomery County. Regional in his perspective and collaborative in nature, Petr is already working with key business, government and education leaders to market the many strengths of Montgomery County with a focus in the areas of business expansion, talent development, international trade, infrastructure, fundraising, advocacy, entrepreneurship and access to capital.



## TEDCO

TEDCO is more than an early stage funding resource. It is the hub of Maryland's entrepreneurial network where startups find mentors, organizational assistance, facilities for daily operations, and a roadmap for success. TEDCO was created by the Maryland State Legislature in 1998 to facilitate the transfer and commercialization of technology from Maryland's



# Sponsors

research universities and federal labs into the marketplace and to assist in the creation and growth of technology-based businesses in all regions of the State. TEDCO is an independent organization that strives to be Maryland's lead source for entrepreneurial business assistance and seed funding for the development of startup companies in Maryland's innovation economy.



## PHIL JUNG, ASSOCIATE, MARYLAND VENTURE FUND

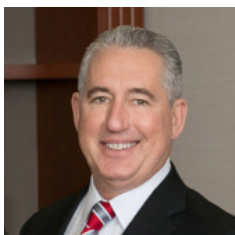
Phil is an Investment Associate at the Maryland Venture Fund, an early-stage, evergreen venture capital firm dedicated to growing the next generation of exceptional businesses in Maryland. With \$110M in assets under management, the Maryland Venture Fund partners with entrepreneurs to build high-growth technology companies that last. Prior to joining the Maryland Venture Fund, Phil was a Venture Capital Fellow for Foundation Capital, a \$325M fund based in Menlo Park, California, that invests in early and growth stage tech companies. Previously, Phil was a Venture Fellow for TDF Ventures, a \$180M venture capital firm based in Chevy Chase, Maryland, that targets early-stage startups in the enterprise software, cloud, XaaS, and infrastructure sectors. Phil began his career at KPMG's Risk Consulting practice in Silicon Valley, specializing in software asset management and contract compliance for Fortune 500 clients. He led a global team of 16 and was the youngest to be promoted to Senior Associate within the division of 60.

In 2012, Phil co-founded the Jeremy Lin Foundation, a Palo Alto based non-profit whose mission is to serve at-risk youth through education and leadership development in underserved communities. Phil graduated with honors from UC Berkeley where he received a BA in Economics and was the founding Vice President of Sigma Alpha Lambda. He earned his MBA with honors from Georgetown University where he focused on general management and entrepreneurship. At Georgetown, Phil was also a Merit Scholar and graduated Beta Gamma Sigma.



## ASSOCIATION FOR ENTERPRISE GROWTH (AEG)

The Association for Enterprise Growth (AEG) is a nonprofit advisory council of experienced business advisors that provide cost-effective expertise and guidance to owners of mid-market companies. AEG consists of experts from complementary professional services disciplines equipped to grow enterprise value and maximize personal wealth for all stages of the business lifecycle—from startup to growth to maturity to transfer or sale.



## JOHN YETMAN, CHAIRMAN, THE ASSOCIATION FOR ENTERPRISE GROWTH; MANAGING DIRECTOR, THE CAPITOL BAY GROUP, A FINANCIAL ADVISORY PRACTICE OF AMERIPRISE FINANCIAL SERVICES INC.

John is the one of the founding members and 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 Securities, Shearson Lehman Brothers and Johnston, Lemon & Company.

John has conducted numerous educational seminars for major corporations and organiza-

# Sponsors

tions, including: The International Monetary Fund (IMF), The World Bank, The Organization of American States (OAS), The Discovery Channel, The Bureau of National Affairs (BNA), General Electric/NBC, Charles E. Smith Companies, The Society of Human Resource Managers (SHRM) and many others.

John has his Certified Investment Management Analyst<sup>®</sup> (CIMA<sup>®</sup>) certification from the Wharton School of Business. He graduated from the University of Maryland with a degree in accounting. He trained and qualified to work with executive's stock option plans as part of the UBS Corporate Executive Services Group. John holds numerous securities industry 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.



**BNY MELLON**



@bnymellon



## BNY MELLON

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.



@RyanWetmorePC

## 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.

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## 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.



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

@umd\_dingman



@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** 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.



@elanafine

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.



@BDOAccountant

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.

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

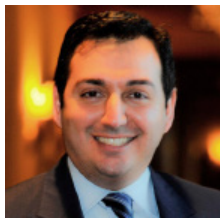
Mark is the Technology Audit Practice leader for BDO's Tysons, Virginia office. Mark focuses on working with early and growth-stage venture-backed technology companies and government contractors. Mark's clients range from early stage startups to well-established middle-market enterprises with domestic 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.



@hafezicapital

### HAFEZICAPITAL INTERNATIONAL CONSULTING

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.



@bhafezi

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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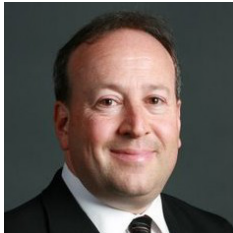


@IESBD

## INSTITUTE FOR EXCELLENCE IN SALES @IESBD

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

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



@MDTechCouncil

## MARYLAND TECH COUNCIL VENTURE MENTORING SERVICE (TCM VMS)

The Tech Council of Maryland Venture Mentoring Service (TCM 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 50th program. 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 TCMVMS program has provided over 575 hours of volunteering and free mentoring. We have ongoing partner relationships with CONNECTpreneur and the Montgomery County Economic Development Corporation. Sponsors include, the Maryland Department of Commerce, Launch WorkPlaces and MCEDC. Interested prospective mentees should submit expressions of interest to the TCM Venture Mentoring Program. For more information, go to <http://www.techcouncilmd.com/careers/mentor-mentee.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.



@WhartonClubDC



@AliQ21

## 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.

## ALI QURESHI, PROGRAM DIRECTOR

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.

SHULMAN  
ROGERS

GANDAL  
PORDY  
ECKER



@ShulmanRogers

SHULMAN, ROGERS, GANDAL, PORDY & ECKER, P.A. @SHULMANROGERS

Shulman Rogers, a full service law firm with 100 attorneys, offers superior legal services across a wide range of practice areas. In the corporate arena, Shulman Rogers provides services including business planning, operational issues, mergers and acquisitions, secu-

rities, tax, intellectual property, employment, immigration, telecommunications, bankruptcy and debt restructuring, and trust and estate planning. In addition, the Firm has vast experience in a broad range of real estate transactions, with a strong emphasis on commercial and residential closings, leasing, landlord-tenant, commercial development, acquisition, sales and related matters. Our litigators handle both general and complex litigation, and all methods of dispute resolution.

Shulman Rogers has garnered a reputation for providing quality representation, business insight, and client value. The Firm also supports its clients by creating opportunities, through its vast client base, for financing procurement, joint venture possibilities and client-to-client business referrals. Experience, breadth of knowledge and commitment to excellence enables the Firm to provide high quality legal services at a reasonable fee. As a result, the Firm is an attractive alternative to larger, higher-priced law firms and to smaller, less diverse firms. Please visit our website at [shulmanrogers.com](http://shulmanrogers.com).



#### ANTHONY MILLIN, OF COUNSEL

Anthony Millin is a trusted legal and business advisor to start-up, early stage and emerging growth companies. As a corporate and securities attorney, a successful serial entrepreneur and a venture capitalist, he brings a unique legal and business perspective to advising his clients. Anthony understands firsthand what it takes to start, scale and manage a company, to successfully prepare for and run a fund-raising process, and to address the legal issues faced by a start-up. This background provides him with valuable insights into the legal and business needs of his clients. His legal practice includes general corporate counseling, formations, preparation of investor packages, angel and institutional equity and debt financings, joint ventures/strategic partnerships, corporate governance, and mergers and acquisitions. Anthony also has worked closely with a range of angel and institutional investors, and assists his clients to identify potential investors. He serves businesses across multiple industries, including internet/SaaS, technology, biotech, clean energy, education, finance, manufacturing and health care. Another specialized skill set Anthony brings to the table is his China-based experience, with which he assists early-stage and middle-market companies interested in conducting business in China, or seeking direct foreign investment from China. Anthony also serves as a Venture Partner at Urban.Us, a seed stage VC firm; a Member of the Board of Directors of the Montgomery County Chamber Community Foundation; and a Co-Founder and Member of the Board of Directors of Lauren's Light, a non-profit organization whose mission is to support and empower families in which a parent with young children has been diagnosed with cancer.



#### THE MELTZER GROUP @MELTZERGROUP

The Meltzer Group is a diversified financial services company based in Bethesda, Maryland. Meltzer has become industry leaders in the insurance field as cited 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.



@MeltzerGroup



### RICHARD DIPIPPA, 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.



@STARTUPHOYAS

### GEORGETOWN ENTREPRENEURSHIP INITIATIVE

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

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



@hoyapreneur

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

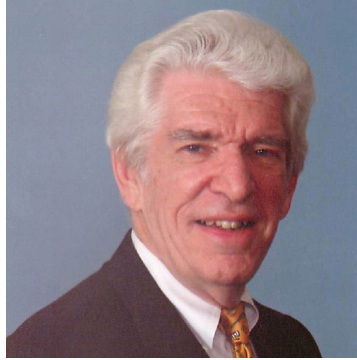
Jeff Reid is the Founding Director of the Georgetown Entrepreneurship Initiative. He has previously held leadership roles at the Network for Teaching Entrepreneurship, DigitalBridge Communications, DLA Piper, and the University of North Carolina at Chapel Hill. In 2009, Reid launched the Georgetown Entrepreneurship 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.



# Thank You to Our Coaches!



**MARK ANDERSEN**  
Partner  
BDO



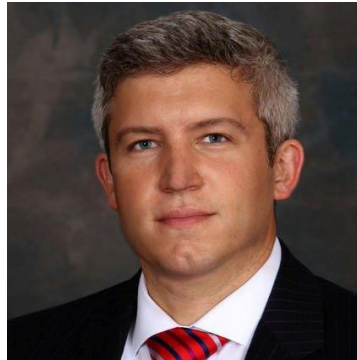
**RICHARD GREENE**  
Advisor & Former President  
DC Metro Keiretsu Forum



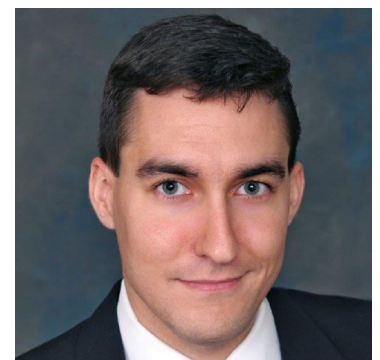
**INGAR GREV**  
Managing Director  
The Growth Coach  
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**BABAK HAFEZI**  
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**MIKE LABRIOLA**  
Partner  
Wilson Sonsini Goodrich  
and Rosati



**INES LEBOW**  
CEO & Transformation Exec-  
utive  
EnterpriseTransformation



**MARISSA LEVIN**  
Founder & CEO  
Successful Culture  
@marissalevin



**BOB LONDON**  
President  
London, Ink  
@londonink

## APERIOMICS, INC.

45085 University Dr, Ste 305 ~ Ashburn VA 20147

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cicenhour@aperiomics.com

www.aperiomics.com



# APERIOMICS

### TEAM:

Crystal R Icenhour, PhD – CEO  
Keith A Crandall, PhD – President  
W Evan Johnson, PhD – Chair, SAB  
Eduardo Castro-Nallar, PhD - SAB  
Yuan Chen, PhD – VP R&D  
Robb Milne – Sales & Marketing Dir  
Kun Ji, PhD – Research Fellow  
Jason Zhang – Software Engineer

### INDUSTRY:

Pathogen Testing

### NUMBER OF EMPLOYEES:

5

### YEAR COMPANY FOUNDED:

2013

### LEGAL STRUCTURE:

C-Corp, Delaware

### LAW FIRMS:

Greenberg Traurig, LLP  
Weily Rein LLP

### FINANCING TO DATE:

Founder \$100,000  
Grants \$1.5M (\$500K Pending)

### FINANCING PLAN:

Seed \$500K (close Sep 2017)  
Series A \$1M  
Exit 2-3 Years

**BUSINESS DESCRIPTION:** *Aperiomics is a precision pathogen testing company working to save lives by changing EVERYTHING about how infections are tested.* Aperiomics' *Xplore-NGS™* is a combination of next-generation sequencing and advanced, proprietary bioinformatic analysis that can identify 33,000+ microorganisms in a single test. This cutting-edge technology is delivered as a service and detects pathogens of public health importance, satisfying the increasing demand for accurate and robust pathogen testing.

*Xplore-NGS™* is delivered as a service and tests samples (human, animal, plant) for the presence of all known microorganisms (bacteria, DNA virus, parasite, and fungi) in a single test. This platform technology has broad application across diverse markets such as clinical, agriculture, environment, industry, and veterinary. The impact of Aperiomics' technologies is broad due to this unique approach to pathogen detection. Instead of blindly probing for a proverbial 'needle in a haystack', Aperiomics' approach analyzes the entire 'haystack', harnessing the power of next-generation sequencing and bioinformatics to identify every 'needle'. ***Xplore-NGS™ is transformative and is changing pathogen identification forever.***

**VALUE PROPOSITION:** Existing pathogen testing, simply put, is inadequate; up to 75% of infections go undiagnosed. Undiagnosed infection costs the US economy billions (undiagnosed fungi alone cost \$26B annually). Further, ***existing tests require one to know what they are looking for; Aperiomics' approach identifies all known microorganisms, even if you don't know what you are looking to find.*** Next-generation

sequencing (NGS) is the future of pathogen testing and is already disrupting cancer testing markets. Data analysis for NGS is more expensive than the generation of NGS data and is a major bottleneck in the adoption of NGS. For NGS to reach its full potential of revolutionizing pathogen detection, data analysis must be robust, simplified, and automated. ***Aperiomics' Xplore-NGS™ does just this, providing a cost-effective method to detect 33,000+ microorganisms in ONE test.***

**COMPANY BACKGROUND:** Aperiomics began operations in late 2014 to develop and commercialize proprietary NGS data analysis tools. Aperiomics is in Ashburn, VA and provides NGS and data analysis services to clinical markets for pathogen identification. Aperiomics is committed to improving global health through precision pathogen testing. Aperiomics was recently named **2016 Healthcare & Life Science Innovator of the Year** and is a finalist again for 2017 by Northern Virginia Chamber of Commerce.

**TEAM:** Aperiomics' team includes the best in genomics and bioinformatics. Drs. Keith Crandall, Eduardo Castro-Nallar, and Evan Johnson are experts in these fields, as demonstrated this through peer-reviewed publications and substantial grant funding in their academic settings. Dr. Crystal Icenhour was recruited in 2014 as founding CEO for her ability to develop, commercialize, and translate complex technologies for pathogen diagnostics, as well as her ability to build, fund, and exit a successful company. Dr. Yuan Chen serves as CTO and has dramatically improved the bioinformatics and operations of Aperiomics' service. Recent hires include bioinformatic and software engineers, with the addition of Drs. Ji and Zhang. Robb Milne joined us in January 2017 to build and execute sales & marketing, bringing a wealth of technical sales experience.

**SERVICE:** From ONE test, Aperiomics' *Xplore-NGS™* can simultaneously detect 33,000+ microorganisms, including pathogenic bacteria, virus, fungi, and parasites. With a novel combination of genomics and informatics, Aperiomics produces faster and better results than culture-based methods and more accurate and

comprehensive results than other molecular approaches. In simple terms, ***Aperiomics combines genetic sequencing with computational power to give a faster, highly specific, and more accurate answer – even in cases where it's unclear what the question should be.*** Applications for this new service are vast and include animal screening, agriculture testing, and human diagnostics. Aperiomics is currently focused on clinical applications and is seeking funding to aggressively expand into the healthcare space. Pricing for Aperiomics' service currently averages \$500 per sample.

Beyond this service model, Aperiomics' will deliver this technology into select clinical markets through a SAAS platform for on-site bioinformatic analysis. Aperiomics' computational assets will also pair well with NGS instrumentation as a third delivery route into broad markets and giving logical acquisition targets.

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**INTELLECTUAL PROPERTY/SPECIAL KNOW-HOW:** With 50+ years of combined experience in molecular and computational technologies, Aperiomics is well-suited to commercialize *Xplore-NGS*<sup>™</sup>. Technology initially developed at The George Washington University and Boston University was initially used, but has since been 100% reengineered for better performance (thus no technology transfer). A combination of trade secrets, copyrights, encryption, and patents are being used to develop a robust intellectual property portfolio. One major differentiation in Aperiomics' platform is its development and implementation under GMP quality standards. All testing is performed in a CLIA/CAP accredited laboratory.

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**MARKETS:** The global In Vitro Diagnostics market was \$60.2B in 2016 and projected to grow to \$81B by 2022. Within this market, NGS is the fastest growing segment, exceeding \$2.5B and a 23% CAGR in 2014. NGS is projected to exceed \$21.4B by 2025. The pathogen testing segment of NGS, and Aperiomics' addressable market is estimated at \$2B in 2017, increasing to ***\$10B+ pathogen test market size by 2025.***

According to CDC, 2.5M cases for 61 reportable infectious diseases were diagnosed in the US in 2015 (5 diagnostic tests per case = 12.5 million tests per year \* \$500 per test) for a ***\$6.25B+ market size as of 2015.*** The overall infectious disease market is substantially larger than just these 61 reportable infections, with 5,000+ causes of infection. Extrapolating this further, we can conservatively estimate the **current, total market size in excess of \$20B.**

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**SALES & MARKETING:** Despite extremely limited sales/marketing resources to date, **Aperiomics has secured 50+ customers, helped ~ 300 patients, and generated \$180K+ revenues since January 1, 2017.** We are FIRST to market and seek to maintain this leader position. The NGS market is moving fast, necessitating aggressive sales & marketing campaigns to ensure market penetration and adequate client acquisition. Due to the specialized and highly technical nature of Aperiomics' service, sales and marketing will be handled through direct sales. Peer-reviewed publications, case studies, conference presentations, social media, inbound marketing, and trade shows will be the primary methods for marketing.

Aperiomics' goal over the 12 months following close of the Seed round is to secure 40 additional clients. Assuming 120 samples per client per year and an average cost of \$500 per sample, for a potential of ***\$3M in service revenues for this initial, scale-up year.***

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**COMPETITION:** At present, several companies provide NGS testing, however they focus on narrow applications for specific diseases such as breast cancer or pre-natal testing. And they do not utilize sophisticated bioinformatics such as *Xplore-NGS*<sup>™</sup>. ***Aperiomics' approach is broad and deep, with the detection of 5,000+ pathogens (33,000+ microorganisms) from a single test.***

---

**USE OF FUNDS:** Funds will be used to continue scaling operations and aggressively marketing Aperiomics' services. Additional staff are needed to increase service capacity, continue development for clinical applications, and penetrate integrative healthcare and concierge medicine markets. All R&D efforts are fully supported through existing and pending government grants. ***We need additional Seed capital to build and execute a robust and aggressive sales/marketing campaign,*** facilitating adoption of this powerful service by more clinicians. And thus, facilitating the improved health outcomes of the millions of people suffering from infection.

## **Friealtor “Your Friend+Realtor”**

Friealtor is a full-service real estate brokerage combined with an intuitive platform that empowers buyers and sellers by giving them the tools, services and expert advice they need to deal directly in a real estate transaction. Just imagine the ease-of-use and storyline format of TurboTax, coupled with the real estate innovations of Redfin. However, the one major difference between Friealtor and any other tech-broker is that it is completely commission-free.

The timing could not be better for a company like Friealtor to enter the market. All the technology partnerships needed already exist to create a flawless real estate transaction. Real estate sellers and buyers have come to expect and enjoy things like e-signature, digital lock boxes, and mobile notification. 90% of the buyers use the internet to search for homes, while 5.2 million homes are sold every year by people using the technology to do it. Hence, real estate agents are finding it harder and harder to justify the 4-6% commissions, as their customers gain increased access to knowledge and intuitive tools the real estate industry uses daily.

Friealtor brings all the technology and expertise into one place. Placing the people that matter most in the know, while providing the experts they need to get the job done commission-free.

The co-founders, Marissa Sens, Praveen Nerellapalli, Chris Schmidt, and William McCoy are a powerhouse team with diverse backgrounds, and years of relevant experience to this field. This along with Masters degree studies in Finance, Computer Science, and Business, give them all the right tools for success. And now that they have successfully shown Friealtor can work with clients in the DC Metro area, their plan is to go nationwide. They have a scalable product and strategic plan to make Friealtor the solution for an industry in need of a system update.

## Business Description:

We use investor capital to originate and service high-yield, short-term loans secured by tangible real estate.

We make money by lending to qualified borrowers with qualified collateral at 10.95% - 12% (plus orig. fees) and paying investors 9.0%.

### Address:

9600 Escarpment Blvd.  
Suite 745 PMB #220  
Austin, TX 78749

### Phone:

(512) 230-9867

### Email:

cort@nexuslending.net

### Website:

www.nexuslending.net

### Industry:

Finance/Hard-Money Lending

### Bank:

Benchmark Bank, Sheila Bostick, V.P.

### Auditor/Accountant:

Jeanine Hemmingway, CPA

### Law Firm:

Transactional—John Taylor, Esq.  
SEC & Formation—RPW Law

### Management

Cortlandt Chalfant, Managing Member  
25+ Year Real Estate Pro.

### Investment to Date:

\$1,300,000 - Manager Capital  
\$5,800,000 - Accredited Investors  
\$6,100,00 - Total (Not Incl. Fund I)

### Track Record:

45 Loans, \$17.9 Million in 18-Mo.

#### For Investors



- ✓ Consistent 9% Pay-Out
- ✓ \$600K+ Paid
- ✓ 0% Default Rate



- ☐ Customer Acquisition Cost: Almost \$0!
- ☐ Nexus Has More Deal Flow Than Capital

#### For Borrowers



- ✓ Best Rates
- ✓ Great Service
- ✓ Reliable \$

## NEXUS SOLVES PROBLEMS

### Problem for Investors



They are looking for more Yield on cash

### Problem for Borrowers



Need cash fast



Locked out of conventional mortgages

## THE ASK | YOUR RETURN

### WE ARE SEEKING ACCREDITED INVESTORS

MINIMUM INVESTMENT = \$25K  
IDEAL INVESTMENT = \$100K - \$1 MILLION

IRA Approved



### WE ARE OFFERING

9% FIXED YIELD (Mo. Distributions)  
+ SECURITY (Hard Assets + Our Money)  
+ ABILITY TO EXIT AFTER 18-Mo's.

Audited Financials + Transparency

\$1,300,000 Manager Investment  
in 1<sup>st</sup>-Loss Position

## VALUE PROPOSITION

- ✓ Yield
- ✓ Security
- ✓ Liquidity



Nexus Creates the Connection  
Between High-Yield  
Borrowers and Investors

NEXUS  
PRIVATE CAPITAL



- ✓ Best Rates
- ✓ Great Service
- ✓ Reliable \$



Tower Building  
1101 Wootton Parkway  
Suite 900  
Rockville, MD, USA  
20850

Main contact:

Sanjay Prasad MD  
c. 3018073840  
sprasad@surgiprice.com

**MANAGEMENT TEAM**

Sanjay Prasad MD, Founder & CEO

Marshall Besch, COO

**INDUSTRY**

Healthcare Services & Technology

**STRATEGIC RELATIONSHIPS**

Agency Growth Mastermind Network  
Roundstone Insurance  
Benefit Advisors Network  
Borislow Insurance  
WellNet Health  
Meritain  
UMR  
Holmes-Murphy

**CURRENT INVESTORS**

Sanjay Prasad MD  
Marshall Besch

**FUNDING TO DATE**

Total previously invested  
\$1,500,000

Individual Investor at ACON  
Investments pledged \$100,000

**FINANCING SOUGHT**

\$1,600,000

**USE OF PROCEEDS**

Technology Refinement, Legal expenses, Insurance, Sales and marketing, working capital, market penetration, salaries, and call center

**LAW FIRMS**

Womble Carlyle

**ACCOUNTING FIRM**

Irving & Associates

**COMPANY DESCRIPTION**

SurgiPrice™ is a disruptive game-changer in healthcare. The online bidding platform seeks to lower employer and employee healthcare costs through competition and improve transparency with quality metric reporting. SurgiPrice™ seeks to arm patients with intelligent data so they can make well-informed decisions. Through the platform, patients also gain access to vanishing deductible options.

Integral to the success of the platform is the healthcare concierge. Patients in need of surgery, with concierge assistance, upload pertinent medical records/imaging onto the SurgiQuality HIPAA-compliant server. Specialized surgeons review the data on the SurgiConnect app and report back bundled pricing and quality metrics. Bundled pricing includes surgeon's, anesthesia and facility fees. Quality data are procedure-specific to include, number of cases performed in the past, success rates and complication rates. The quality data are letter-graded against available national norms.

Patients choose from a list of surgeons, associated out-of-pocket costs and letter-graded quality metrics. Travel costs can be included when the savings allow.

The SurgiPrice™ platform is forcing providers to compete in the marketplace for patients in need of surgery. SurgiPrice™ takes advantage of under-utilization both within provider and facility networks.

The revenue model consists of charging employers, a tiered \$0 to \$20 PEPM (per employee per month) with a 1/3 savings share. The \$0 PEPM will only apply to the first 3 employers, until we prove the concept in a geographic area.

SurgiPrice™ has contracted with the first 3 employers in the greater St. Louis area and surgical bidding will commence this month. 2 additional employers have contracts that are pending.

**TARGET MARKETS**

Employers are suffocating from double-digit annual increases in healthcare costs. The current trend is unsustainable. Hungry for solutions, these employers are adopting self-insured health plans and transferring the burden to their employees through high-deductible plans at an alarming rate. 82% of all employers with more than 500 employees are now self-insured. The situation could never be riper for a disruptive solution.

Savings from the SurgiPrice™ platform are dependent on the number of procedures in any given year. Typically 18% of a given population needs a surgical procedure during the course of a year. Conservatively estimated average savings using the SurgiPrice™ platform is \$3500 per procedure.

Employers with 500, 7500 and 20,000 employees, who typically spend \$5M, \$75M and \$200M, respectively, can expect savings of \$875K, \$13.125M and \$35M, respectively.

Our sales force consists of nationwide benefits consultants who serve to manage these employers. Our Founder is the Medical Director for Agency Growth Mastermind Network, an organization of agency owners in the benefits consultant space. He also has affiliations with Roundstone insurance, a large player in the captive stop loss space, and the Benefit Advisors Network, another nationwide association of benefits consultants. Eventually we will target institutional benefits consultants such as AON Hewitt, Arthur Gallagher & Co, Mercer and Towers Watson.

Surgeons and facilities gain access to surgical patients that they would not ordinarily see, are able to fill under-utilized operating room time and are promised prompt payment in full, soon after completion of the procedure. There is no subscription fee until we attain geographic saturation of a specialty.

## COMPETITION

### DIRECT CONTRACTING AND FIXED-PRICE NETWORKS

Very large employers, like General Electric, have taken matters into their own hands, contracting directly with name brand academic “Centers for Excellence”. This development plays directly into our platform. These institutions are developing bundled pricing and will be ready for the transition to SurgiPrice™. Our platform will seek to hold these self-designated “Centers for Excellence” more accountable on the individual surgeon level.

Large TPAs such as WellNet Health, HealthSmart and HealthScope and Healthcare IT companies like BridgeHealth have developed fixed reference-based pricing networks of surgeons and facilities, and rented these to employers. The SurgiPrice™ platform can easily use these pricing levels as a ceiling against which to bid against.

### PRICING

Other companies, such as Healthcare Blue Book and Pratter have provided price transparency platforms, for employers to use.

### BIDDING

Medibid, our closest competitor, provides a bidding strategy for not only surgery but also all medical services.

### MARKET SIZE

The overall surgical market is enormous. In 2012, 99.5 M procedures were performed in the US and at an average of \$9000 per procedure; the size of the market is \$895 B. There is certainly room for additional players.

### ADVANTAGES

Our relationship, with benefits consultants and their associations, is our strongest asset, followed closely by our ability to collect surgeon quality metrics.

## MILESTONES

2007 – Opened Tower Oaks Surgery Center and developed bundled pricing  
 2007-2009 – Refined the manual process of bidding  
 2012 – We add multiple specialties  
 Jan 2014 Remarketed as SurgiPrice™  
 May 2014 Launched SurgiPrice™ Website  
<https://www.SurgiPrice.com>  
 May 2014 Identified Self-Insured employers as the target market  
 Aug 2014 Filed with USPTO for Trademark SurgiPrice™  
 Sept 2014 - Dec 2015 Employed in-house software engineers to build iOS and Android apps  
 2014- 2017- Developed relationships with benefits consultants

Founder Sanjay Prasad MD

Medical Director: Tower Oaks Surgery Center  
 Medical Director: Agency Growth Mastermind Network  
 Affiliation with Roundstone Insurance  
 Affiliation with Benefit Advisors Network  
 Affiliation with nationwide Surgery Center Management Organizations

June 2017- Launched SurgiConnect app in iOS and Android  
 July 2017 Contracted with first 3 employers in greater St Louis area.  
 September 2017- Surgical Bidding Commencing

### Three-Year Financial Projection

	Year 1	Year 2	Year 3
<b>Revenue</b>	\$855,567	\$14,427,575	\$112,448,840
<b>EBITDA</b>	\$825,840	\$9,281,774	\$78,210,212
<b>Net Income</b>	\$619,380	\$6,197,078	\$57,732,322



# FoolWorks

***Don't assess your employees.  
Develop your people.***

## The Problem

The majority of people go to work every day feeling neutral or, even worse, negative about their day ahead. Indeed, nearly 70% of all US workers are disengaged at work. HR management “best practices” are totally outdated for the knowledge economy. And most available software tools simply try to scale these ineffective approaches. This presents a massive opportunity to reimagine talent management and people development, and to improve the bottom lines of SMBs by setting up their people for greater success.

**Market:** HR Tech

**Product:** SaaS people development

**Seeking:** \$3-5 Million

**Use:** Product development, sales, and marketing

## Our Solution

FoolWorks is a SaaS product that delivers a unique, bottoms-up approach to employee feedback, development, and coaching. We flip the entire model on its head by putting individuals in control of their development while enabling meaningful and actionable conversations with managers and among teams.

## Our Team

The founders and advisory team have worked together for over 15 years to create the award-winning culture at The Motley Fool, which Glassdoor named the #1 Best Place to Work two years running in 2014 and 2015 for medium-sized businesses. FoolWorks is the result of over four years of internal development from the People and Technology teams at The Motley Fool.

## Market Opportunity

The legacy processes for evaluating and developing employees are being discarded, with nearly 80% of executives rating the redesign of performance management as a high priority. The HR technology software market is set to be \$21 billion in 2017 and grow to \$24 billion in 2018, according to Forrester. And HR is one of the top five markets for corporate SaaS adoption. FoolWorks is ready-made software for SMBs, of which there are 600,000 in the US with 20+ employees.

## Competition

There are several competitors touting a modern approach to talent and performance management. There are also legacy providers trying to reimagine their offerings. But, FoolWorks' unique employee-driven approach and focus on development, not assessment – all predicated on The Motley Fool's culture and stress-tested over years of actual use – make it a very compelling choice for our target audience of like-minded companies.

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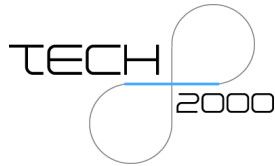
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