

Tower Club - Tysons Corner
September 20, 2021

The Big Idea
CONNECTpreneur
Networking &
Pitch
Extravaganza!

Join the conversation on Twitter
#connectpreneur

SCHEDULE

MONDAY, SEPTEMBER 20, 2021

5:00-6:15 pm REGISTRATION AND POWER NETWORKING – ATRIUM, CRESCENT LOUNGE, & BALCONIES

6:15-6:30 pm

WELCOME REMARKS – FAIRFAX ROOM

TIEN WONG, Founder and Host, CONNECTpreneur

JULIE COONS, CEO, NOVA Chamber of Commerce

KARA MAYLE, Regional General Manager, Tower Club

COMPANY SHOWCASE / ROCKET PITCH

6:30-7:30 pm – Intros by: Anthony Millin, Founder and Chair, NEXT Powered by Shulman Rogers. Angie O’Grady, COO, StellaPop

AEG – Mark Haas

FireBot – Mark Baldino

IntelliSpeX – Blake Ratcliff

Novel Microdevices – Andrea Pais

Qore Health – Diego Zambrano

Real Science Innovations – Justin Moglignoni

Revolution Cooking – Tom Klaff

Reverse Ionizer – Patrick Hughes

SurgiPrice – Sanjay Prasad

Verax Research Services, Inc. – Renato Cataldo

7:30-8:45 pm

EXPO AND NETWORKING –

ATRIUM, CRESCENT LOUNGE, & BALCONIES

OUR SPEAKERS



TIEN WONG, CEO, OPUS8, INC.

Tien is Chairman and CEO of Opus8, an investment and advisory firm which helps technology companies and alternative investment fund managers raise capital. He is also Chairman of Tech 2000, a Northern Virginia based leader in technology training and learning analytics, as well as Chairman of Lore Systems, a provider of network engineering, cloud computing, and strategic IT consulting.

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 \$2+ billion in revenue as a division of Xerox. CyberRep was ranked for 4 consecutive years in INC. Magazine's "Inc. 500" as one of the fastest growing 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 on CRM and BPO topics. 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 (MD) Economic Development Corp., Center for Innovation Technology GAP Fund's Investment Advisory Board, the Northern Virginia Chamber of Commerce, and Refraction. 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.



JULIE COONS, PRESIDENT & CEO, NORTHERN VIRGINIA CHAMBER OF COMMERCE

Julie Coons is a transformative business leader who delivers unprecedented revenue and profit growth through innovation, operational excellence and cultural change. She is President & CEO of the Northern Virginia Chamber of Commerce, the Voice of Business in Northern Virginia™, representing local employers with more than 500,000 regional employees. The Northern Virginia Chamber is the leader in advancing innovative solutions to the region's priorities in transportation, education, workforce, and economic opportunity. For 90-plus years, the Northern Virginia Chamber has been working hand-in-hand with companies in the region to build a strong business community.

From 2017-2018 Ms. Coons served as COO of the Council of Better Business Bureaus. The Council of Better Business Bureaus is a \$31m organization comprised of a range of national programs, over 100 BBB national partners throughout North America. From 2008-2016, Ms. Coons served as the President and CEO of the Electronic Retailing Association where she led a significant financial and brand transformation of the association. Previously, Ms. Coons served as president and CEO of the Tech Council of Maryland, where she led the association to a regional position of influence. Before joining TCM, Ms. Coons was executive vice president at PCIA-The Wireless Infrastructure Association, a telecommunications trade association. Prior to the non-profit world, Ms. Coons led international business development for several telecommunications companies.

She has been an active member of numerous non-profit boards including the Advertising Self-Regulation Council and an active member of the International Women's Forum and the American Society of Association Executives. She was recently named one of the 2018 DCA Live Non-Profit Leaders. Ms. Coons graduated cum laude from the University of the Pacific in Stockton, CA, with a B.A. in economics and B.A. in Japanese language and literature.

OUR SPEAKERS



KARA MAYLE, REGIONAL GENERAL MANAGER, TOWER CLUB

Kara's career in hospitality started in Scottsdale, Arizona with Denihan Hospitality Group after she received her Culinary Arts Certification at The Arizona Culinary Institute. When the hotel was sold, Kara was asked to be a part of the opening task force for The James Chicago working for celebrity Chef David Burke, and later The Liason Capitol Hill with celebrity Chef Art Smith in Washington, DC. Just prior to joining Clubcorp, Kara was the Corporate Management Trainer and General Manager for Chef Geoff's Restaurant Group. Kara is an introductory sommelier and has great a passion for food and wine. Kara's career with ClubCorp started in 2014 at The Tower Club and has continued to the role of Regional General Manager running both The Tower Club as well as The City Club of Washington. Kara and her husband have a home in Fairfax, VA, that they share with their son, Colton and daughter, Riley.

OUR PARTNERS

TOWER CLUB TYSONS CORNER

Tower Club Tysons Corner is a diverse business and social community. located in the heart of Northern Virginia, the Club is where local power players come to work and connect. With exceptional programming, business and social events, Members build lifelong relationships and develop a network of connections that lead to personal fulfillment and invaluable memories.

Build your network of business and social connections at our special Member events. Our Members include local professionals, civic and community leaders and other influential people to enhance your circle of friends. Our programs are designed to enrich your life with cultural, educational and business-oriented events to match your interests. Enjoy guest speakers, professional seminars, and exclusive member committees, clubs and events. For more info: <https://www.clubcorp.com/Clubs/The-Tower-Club-Tyson-Corner/Contact-Us/>

NORTHERN VIRGINIA CHAMBER OF COMMERCE

The Northern Virginia Chamber of Commerce (Northern Virginia Chamber), the Voice of Business in Northern Virginia™, represents over 650 local employers with more than 500,000 regional employees. The Northern Virginia Chamber is the leader in advancing innovative solutions to the region's priorities in transportation, education, workforce, and economic opportunity. For 90-plus years, the Northern Virginia Chamber has been working hand-in-hand with companies in the region to build a strong business community. To learn more about the Northern Virginia Chamber, please visit <http://www.novachamber.org> and follow the Northern Virginia Chamber on Twitter: @NOVAChamber



NEXT powered by SHULMAN ROGERS

NEXT disrupts the legacy legal industry by offering a broad range of fixed fee solutions (stand-alone products and annual legal plans) delivered by senior attorneys with valuable business expertise. NEXT solves the problem that startup and emerging growth companies face when launching their business as well as scaling: lack of access to predictable legal fees, seasoned attorneys, the latest technology and key business services. We use cutting edge technology platforms to deliver real efficiencies, transparency and a collaborative environment for clients, attorneys and investors. NEXT partners with its clients to de-risk their business and get to the NEXT level, together reaching each milestone of success.

NEXT is powered by Shulman Rogers, a full-service law firm with nearly 100 attorneys offering superior service across a wide range of practice areas. In the corporate arena, Shulman Rogers provides services including business planning, operational issues, M&A, litigation, commercial real estate, landlord-tenant, commercial development, securities, tax, intellectual property, immigration, telecommunications and bankruptcy/debt restructuring. The firm also offers robust personal services such as residential closings and trust and estate planning. Shulman Rogers has earned its reputation for providing quality representation, business insight and client value, serving as a highly attractive alternative to larger, higher-priced firms and smaller, less diverse firms. Learn more at ShulmanRogers.com.

ANTHONY MILLIN, NEXT CHAIR & PARTNER, SHULMAN, ROGERS



Anthony Millin is the Chair of NEXT and a trusted legal and business advisor to startup, early-stage and emerging growth companies. As a corporate and securities attorney, a successful serial entrepreneur and a venture capitalist, Anthony brings a unique legal and business perspective to advising his clients. "Anthony has had a tremendous impact on the success of my company since we were in the startup phase," says Dale Nirvani Pfeifer, Founder and CEO of GoodWorld. "He has not only provided sound and creative legal support but has also served as a key business advisor throughout the growth of my company." 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 startup. This background provides him with valuable insights into the legal and business needs of his clients. Anthony has worked closely with a range of angel and institutional investors and helps clients identify real opportunities. He serves businesses across multiple industries including internet/SaaS, technology, biotech, cleantech, ed tech, fintech and health care. Another specialized skill set Anthony brings to the table is his China-based experience, assisting early-stage and middle-market companies interested in conducting business in China or seeking direct foreign investment from China. Contact Anthony at amillin@shulmanrogers.com.

OUR PARTNERS



AEG

AEG is a growing and profitable company that provides elite business advisors and midmarket CEOs unprecedented business development and peer to peer networking opportunities through an ecosystem of city-based communities. Deliberate culture and technology create deep personal relationships to drive fast and efficient business referrals that accelerate business development and growth for these advisors and CEO peer groups.



MARK HAAS, CEO, AEG

Mark Haas is President of Research and Organization Management, a strategy development and performance management consulting firm based in Washington, DC. He advises executives and Boards on diagnostics, strategy, business models and performance management aimed at growth, strengthening operations and agility. His consulting includes leadership training for Tanzanian energy executives, developing curricula to train consultants in 40 countries for an international bank, crafting strategy and innovative business models for a \$120 million nonprofit, emerging two scientific associations, reorganizing a biomedical research agency, revitalizing a human service nonprofit and developing strategy for a national vital records enterprise.

MONTGOMERY COUNTY ECONOMIC DEVELOPMENT CORPORATION

The Montgomery County Economic Development Corporation (MCEDC) is a 501 (c)(3) nonprofit organization created to promote economic growth in Montgomery County, MD and support companies in achieving business success. Our retention and recruitment professionals help find the ideal location, attract top talent, and understand current market conditions.

BILL TOMPKINS, INTERIM PRESIDENT AND CEO AND CHIEF OPERATING OFFICER, MONTGOMERY COUNTY ECONOMIC DEVELOPMENT CORPORATION

Bill Tompkins is MCEDC's Interim President and CEO, as well as the Chief Operating Officer, working to direct business operations, implement the Strategic Plan and strengthen strategic partnerships. Bill helps to ensure that Montgomery County is one of the best places to grow business in the country.

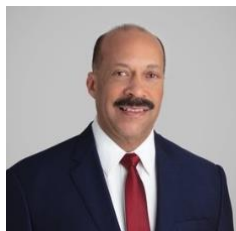
He brings to MCEDC a strong and wide-ranging background in, business operations, strategic planning, marketing and nonprofit management, serving for most of his career as a senior executive in the media and entertainment industries with Fortune 500 companies. Bill has also had a consulting practice that advised companies on strategic business opportunities and brand transformation. He has been a key senior member of media companies including The Washington Post. Former experience also includes work as President of the National Newspaper Publishers Association which represents over 200 Black-owned-and-operated newspapers across the nation. Much of his career was built at the Eastman Kodak Company, where he rose to become head of the global \$700 million Motion Picture Film Group.

Bill received his MBA from Harvard Business School where he was a General Motors Fellow and received his BA in Economics, Magna Cum Laude from Tufts University.

A resident of Montgomery County for more than 30 years, Bill is helping to build the MCEDC team and contribute to programs that help current and potential businesses thrive.

FAIRFAX COUNTY ECONOMIC DEVELOPMENT AUTHORITY

The Fairfax County Economic Development Authority promotes Fairfax County as a business and technology center and innovation hub. The FCEDA offers site location and business development assistance, and connections with county and state government agencies, to help companies locate and expand in Fairfax County. In addition to its headquarters in Tysons, Fairfax County's largest business district, the FCEDA maintains business investment offices in six important global business centers: Bangalore/Mumbai, Berlin, London, Los Angeles, Seoul and Tel Aviv. Follow the FCEDA on Facebook, Instagram, LinkedIn, Twitter and YouTube. The FCEDA is a member of the Northern Virginia Economic Development Alliance, which promotes and markets Northern Virginia outside the region and conducts activities and events to build the regional business community.





VICTOR HOSKINS, PRESIDENT & CEO, FAIRFAX COUNTY ECONOMIC DEVELOPMENT AUTHORITY

Victor Hoskins joined the Fairfax County (Va.) Economic Development Authority as president and CEO on August 5, 2019. Previously, he was the director of Arlington (Va.) Economic Development since 2015. In that role he is most known for leading the team that successfully attracted Amazon HQ2 to Arlington County, a deal that will bring between 25,000 and 37,850 Amazon jobs to Arlington, stimulate creation of another 75,000 jobs in the Washington region, and generate between \$3.2 and \$4.8 billion in revenue for the Commonwealth of Virginia.

Since he arrived at the FCEDA, Microsoft announced a 400,000-square foot software R&D center that will have 1,500 employees. This was the largest transaction in Northern Virginia for 2020. Google, Facebook, Amazon Web Services, Volkswagen Group of America, Guidehouse, StarKist and the global law firm of King & Spalding also announced locations in Fairfax County.

Previously, Mr. Hoskins worked in private real estate investment on Wall Street. He also served as deputy mayor of economic development for the District of Columbia. During his career, his work has resulted in almost 375,000 jobs, and he has led the teams that negotiated more than 700 major business deals resulting in billions of dollars in private investment.

Mr. Hoskins received the 2020 Regional Leadership Award from Leadership Fairfax Inc. He also received the 2019 Ronald Kirby Award for Collaborative Leadership from the Metropolitan Washington Council of Governments. Virginia Business magazine named him one of the “100 People to Meet in 2020” list, its 2021 list of “Heavy Hitters” shaping Virginia, and its 2021 Virginia 500 list of the most influential people in Virginia.

He holds a master’s degree in city planning from the Massachusetts Institute of Technology and a bachelor’s degree with honors from Dartmouth College.



NFP

NFP is a leading insurance broker and consultant that provides employee benefits, property and casualty, retirement and individual private client solutions through our licensed subsidiaries and affiliates. We have specialized experts across multiple industries and products, and are unique in that we provide a boutique offering, with the tools, resources, and leverage of one of the world’s largest privately-owned brokers. We like to ask questions in order to understand our clients and their business, allowing us to work collaboratively to help solve their biggest problems. We’re intentional with identifying and understanding what the issues are and connecting solutions to solve those issues. Our expertise is matched by our commitment to each client’s goals and enhanced by our investments in innovative technologies in the insurance brokerage and consulting space. Locally, NFP is the largest employee benefits broker and insurance advisor in the Washington Metro Region (Washington Business Journal), while also ranking among the top corporate philanthropists in the region on an annual basis (Washington Business Journal).



ETHAN FOXMAN, NFP ATLANTIC PRESIDENT

Ethan has been in the insurance business for over 20 years and is currently President of NFP’s Atlantic Region, overseeing nearly 50 offices and more than 1,000 team members. Ethan had served as President of NFP’s Mid-Atlantic Region since 2016 prior to the Mid-Atlantic and Southeast Regions merging in 2021. Prior to NFP, Ethan served as The Meltzer Group’s Chief Operating Officer, and later as President, leading the largest insurance broker in the Washington, D.C. region. Ethan entered the insurance industry in 1999 with Group Dental Services (GDS), a niche provider of ancillary benefit plans to the labor union market. From 1999 until 2006 Ethan served in nearly every role at GDS, including underwriting, finance, operations, sales and client management. Under Ethan’s leadership GDS grew from \$10 million to nearly \$50 million in revenue, and in 2008 was purchased by Coventry Healthcare, the sixth largest public healthcare company in the country. Ethan remained with Coventry until 2013 as President of the dental and vision business. Ethan earned his bachelor’s degree from the University of Vermont and later added a MBA from the University of Maryland. He has served on a number of Boards, including the University of Maryland Smith School of Business, The Honour Society, and the Humane Society Maryland State Council, and is an active member of Young Presidents Organization (YPO).

OUR PARTNERS



STELLAPOP

The Pursuit for Relentless. Like the brain, StellaPop's capabilities are divided into two halves: management and creative consulting. We specialize in functions within each while maintaining a deep understanding of how one affects the other. We know that within every company, the two sides must work together seamlessly to drive success.

We're in the "creating solutions for your business" business. With tailor-made answers, we accelerate growth, expand markets, streamline operations, leverage technology, and activate brands. Our marketing expertise serves a diverse range of industries including public, private, manufacturing, retail, financial, science, medical, pharmaceutical, engineering, aerospace, real estate, education, and not-for-profit.



ANGIE O'GRADY, COO, PARTNER, STELLAPOP

As soon as my feet hit the floor in the morning, I'm running full speed, and that's the way I like it.

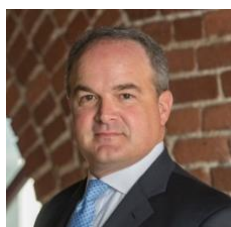
I spent 15 years as employee number one, the President and COO for Carr Workplaces, building it into a 30 location multi-million dollar business. Before Carr, I spent 14 years at HQ Global Workplaces, now known as Regus. I was coworking when coworking was executive suites, and now I'm leading the charge into 2021 as the industry innovates to a more flexible office concept.

In January 2015, I decided to join my husband, Mike, as a partner and thought leader on the business management consulting side. StellaPop's primary focus is assisting client CEO's in improving their people, operations, brand, and bottom line. On the personal side, when I'm not moving and shaking at work, you can find me lacing up my sneakers and hitting the running path or spending time at our son's basketball events.



FIRST FINANCIAL

Headquartered in Bethesda, Maryland, First Financial Group is a complete financial services firm – one of the largest independently owned businesses of its kind in the Mid-Atlantic region. The firm employs over 140 representatives and 1,200 licensed brokers. Business services include Executive Benefits Planning, Key Person Planning, Qualified Retirement Plans, Deferred Compensation Planning, Group Benefits, Buy-Sell Planning, and Succession Planning.



DEVON CURY, CAP®, DIRECTOR ADVANCED PLANNING, FIRST FINANCIAL GROUP

Devon Cury is the Director of Advanced Planning for First Financial Group, with more than 25 years of experience in wealth management, investment management, and risk management. Before joining FFG in 2014, he held executive leadership roles at Advancement Concepts and AXA Advisors. He specializes in working with business owners and executives on strategies to reward, retain, and recruit top talent.

Devon has completed the Retirement Specialist Certification from the Wharton Business School and holds the Certified Advisor of Philanthropy designation. He has served on the Executive Advisory Council of the Robins Business School at the University of Richmond and as the Chairman of the Catholic Planned giving Council.



MARYLAND TECH COUNCIL VENTURE MENTORING SERVICE (MTC VMS)

The Maryland Tech Council Venture Mentoring Program (MTC VMS) is one of the leading team mentoring services available in the State of Maryland that is both highly sophisticated and results-driven. It exists to foster an environment that encourages innovation while expanding financial and business opportunities for tech, cyber, and life science start-ups.

The MTC VMS Program provides free team-based mentoring services to qualified Maryland-based tech and life science venture CEOs who are accepted into the program. Since the MTC VMS program began, more than 45 ventures have enrolled & \$55.MM has been raised in capital & grants. More than 13,000 volunteer hours have been contributed by mentors & managing committee members, with mentor training programs scheduled monthly across the State of Maryland. More than 225 mentor team meetings have taken place. The MTC VMS program has trained more than 105 mentors.

OUR PARTNERS



SALLY STERNBACH, FOUNDER, MD TECH COUNCIL 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.

RYAN & WETMORE, P.C.

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.

PETE RYAN, CO-FOUNDER & PARTNER, RYAN & WETMORE

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 several 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.

Pete is on the leadership board for the local chapter of the Alliance of Mergers and Acquisition Advisors. Pete is also an active member of the Greater Washington Society of Certified Public Accountants, and the American Institute of Certified Public Accountants, among many other professional organizations.





Value Proposition

Accelerate business development by connecting a national ecosystem of elite advisors with CEOs to grow enterprise value & build personal wealth.

AEG at a Glance

Leadership Team

Mark Haas, Co-Founder, CEO
John Yetman, Co-founder, Chair
Tien Wong, Principal Advisor

Key Advisors

Mike Niggel, CEO, ACT I
Tom Shoemaker, Fmr CEO, Phacil
Jeff Galvin, CEO AGT
Amit Puri, CEO, Kurtek
Beth Johnson, CEO, RP3

Industry

Business services

Incorporation

2019 as a Delaware LLC

Headquarters

Gaithersburg, MD

Bank

Bank of America

Law Firm

Shulman Rogers

Prior Funding

Self-funded by founders and funds from operations

Investors

Tien Wong, Mike Niggel,
Sid Stanton

Financing Sought

\$500K seed, \$50,000 minimum,
2-year convertible note.

Use of Funds

Marketing infrastructure, member development staffing, chapter startup costs

Domain

enterprisegrowth.org

Contact

Mark Haas, CEO, 301-442-5889
mhaas@enterprisegrowth.org

September 2021

Business Description: Membership organization of elite business advisors and midmarket CEOs, organized as an ecosystem of city-based chapters of advisors in complementary disciplines and CEO peer groups. Deliberate culture and technology create deep personal relationships to drive fast and efficient business referrals that accelerate business development and growth.

Problem AEG Solves: Midmarket businesses experience suboptimal growth due to complexity, inefficient decision making, loss of trust, and challenges sourcing advice. The average business operates at 73% of potential and 90% of owners are unhappy upon exit. Seamless access to a network of elite, trusted advisors, connected to the local CEO community, builds value and wealth.

Product/Service: City-based and virtual communities of business advisors connected into advisory ecosystem. Marketing and administrative services run nationally for scale economies, quality control and brand continuity. Peer groups of midmarket CEOs (with different offering than YPO, WPO, EO) in each city to complement the local AEG elite advisor group.

Business Model: Membership organization of city-based and virtual chapters of 50-80 elite, vetted advisors, plus separate peer groups of 50 CEOs. Recurring revenue of 85% and high gross margins. Subscriber model with member dues paid in advance. Platform for added revenue streams (e.g., sponsors, events).

Leadership Team: Co-Founder Mark Haas, CEO (40 years as management consultant and CEO advisor). Co-founder John Yetman, Chair (35 years as wealth manager for HNW executives) and Principal Advisor Tien Wong (35 years as entrepreneur, CEO, and angel investor).

Management and Advisory Board: Management team of AEG elite advisors with expertise in operations, sales, marketing, strategy, finance, and analytics. Chapter Advisory Boards consist of local CEOs and centers of influence in various industries to guide AEG growth and supporting members.

Market: 1.5M US midmarket companies seek elite advisors and are candidates for executive peer groups. SAM of 7M advisors and 10M C-Suite executives. SOM of 360K top 5% advisors as chapter member candidates and 1.2M key executives as Inner Circle candidates. Targeting 50 US cities with >\$100B GDP.

Distribution Channels: Acquire members through member-to-member referrals, targeted outreach, marketing events, and educational activities. Minimal acquisition costs, member retention >90%.

Competition: Advisor business referral groups and professional or industry associations (e.g., Accelerant, ACG, BNI, trade groups); CEO peer groups (e.g., YPO, Vistage, CEN, EO, CEO Focus). Members are often in multiple groups.

Traction: AEG started in Washington, DC and added the Baltimore chapter 1Q2021 and is expanding to other chapters later in the year, including virtual. First CEO peer group launched February 2021. Developing partnerships with assessment, advisory and research groups. YTD revenue +66% vs 2020.

Exit Strategy: Sell no later than 2026 to a strategic buyer such as private equity, insurance, investment banking, or wealth management firm for AEG's cash flow, deal flow, and relationships with executives and high net worth

	2021	2022	2023	2024	2025	2026
Revenue	\$1	\$3	\$8	\$18	\$33	\$53
Net income	\$0	\$0	\$3	\$8	\$15	\$24

FireBot Suppression

Business problem: Residential stovetop fires cause billions of dollars of damage every year.

Stop Half Of Home Fires

Our solution: 5-year battery operated fire suppression device, installs in all kitchens 5 minutes. 139 Million Kitchens in US

Industry: Consumer Products, Fire Safety

B2B, B2C, Construction, Consumer Devices, Home Automation, IOT Manufacturing, Marketing Products, Real-Estate, Robotics, Safety

Valuation basis: Last round banked

Investment: Equity (pre-money)

Raise amount: \$3,000,000

Pre-Valuation: \$30,000,000

Exit year: 5

Exit Valuation: \$895,000,000

Buy: 9.09% @ \$330,000

ROI: 97.22%/y

TAM: \$31,740,000,000

CAGR: 75.53%

Runway (months): 5

Burn Rate: \$150,000/Mo.

Projections	Last FY	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue	-	\$14,000,000	\$27,000,000	\$82,000,000	\$245,000,000	\$514,000,000
Direct Costs	\$350,000	\$3,000,000	\$7,000,000	\$20,000,000	\$61,000,000	\$129,000,000
Gross Margin	(\$350,000)	\$11,000,000	\$20,000,000	\$62,000,000	\$184,000,000	\$385,000,000
Indirect costs	-	\$5,000,000	\$11,000,000	\$33,000,000	\$98,000,000	\$206,000,000
EBIDTA	(\$350,000)	\$6,000,000	\$9,000,000	\$29,000,000	\$86,000,000	\$179,000,000
Share (%)	N/A%	0.03%	0.03%	0.05%	0.08%	0.10%

Business Summary: We manufacture and sell fire suppression devices.

Business Model: Worldwide Market, In US alone 139M housing units *2019 census Conservative market sales estimated at 10% of the total housing in the US (13.9M)-\$2.5 Billion Gross Revenue.

First Customers, Multifamily Management Companies, Construction Companies, Commercial Property Management Companies, Condominiums, Assisted Living, HUD and Military housing, Student Housing. Individual owned detached & attached housing Who Will Help, Smart Home IOT, Fire Safety, Home Stores Construction, and Alarm Companies. Kitchen Appliance manufactures with integration and licensing agreements with future look to Fire Code requirements Vacation Rental and Investment Properties required by insurance and mortgage companies.

Fire Restoration Companies, The Guarantee Failsafe Plan, they are called to repair 172,000 burned kitchens a year. Ma'am, thanks for your \$40,000 can we install a FireBot for \$250 and you never have to worry again about a stove top fire.

Competitive Advantage(s): USPTO Awarded Patented Design, Low Cost, UL300AF Compliant, Non-Toxic, Biodegradable Suppressant

Exit Strategy: 5 years 895M to one billion to purchase company, Strategic Buyers Fire Safety Construction Property Management Home Automation Insurance Alarm

Current situation: build 50 units to bench cycle testing, 250 for real life install testing for 2-3 months, if all good production run 10K units

Desired action(s): We are seeking an investment of 3 million dollars. In Return 10% Company Ownership 300,000 Preferred Shares

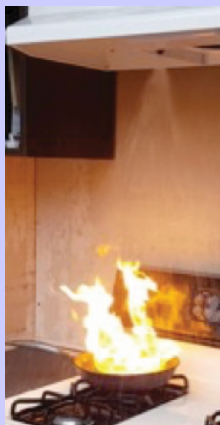
Contact: Mark Baldino Title: CEO

mark@firebotssuppression.com

Tel: 703-906-3154

<http://www.firebotssuppression.com>

The World's First Smart Cooktop Fire Suppression System



Management

CEO & Founder – Blake Ratcliff
 CMO & Strategy – Charlie Eadie
 Development – Charity Davis
 Client Success – Kurtis Ratcliff
 Investor Relations – Scott Kushino

30 years of construction leadership + \$ Billions in technology exits

Industry – Construction Tech

Employees – 10

CPA – Poole Accounting

Legal – Tango Law

Compliance – Carta

IP – Clements Bernard Walker

Financing Sought – \$2M remaining of \$4.5M Series A preferred

Seed Financing – \$1M

Current Total Invested - \$3.5M

Valuation - \$14.92M

Investors

- Gallium Real Estate Trust
- Phigenics LLC
- ISX LLC
- Industry leaders and Angels (30+ Military Academy biz leaders)

Use of Funds – Product Development, Sales & Marketing

Patents (2) – published April 2021, patent pending

Delaware C Corp

HQ – Prague, OK – Hub Zone certification submitted

Market Position – Early revenue; 5,000 projects completed

Available on browser, Android, and Apple iOS

Blake Ratcliff, Founder & CEO
 IntelliSpeX Inc.
 571.228.5074
 Blake.Ratcliff@IntelliSpeX.com

Value Proposition – Hello Project Truth. Goodbye Uncertainty and Stress.

Problem – Construction is broken. Chaos. Costs. Risks abound. Market sources cite a \$1.6 trillion annualized waste problem. 1,000,000 people deficit in workforce. Automating the status quo has failed...and Gen Z isn't inspired to join the industry.

- **Communications** – broken, fragmented communications drive high stress; a 21.4% annual staff attrition rate and accidental deaths rate 5% this past year are call for alarm and change.
- **Productivity** – 98% of projects are behind schedule. 90% are over budget.
- **Profits** – Average net profit is only 2.5%

Solution – IntelliSpeX. Walk... Talk... and Record... One app that unlocks healthier people, projects, and profits. In only 3 clicks, users gain 25% more-time, 50% more profit, and 100% project certainty. For \$35/month, we deliver \$500/month in value.

Secret Sauce – IntelliSpeX's patented story board data structure creates the industry's only simple tool to instantly create shared situational awareness. Users call IntelliSpeX fun. Owners know instantly the status and engagement of their team. Tradesmen gain a single source of project truth.

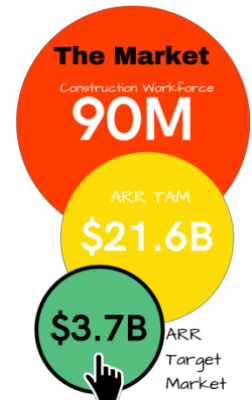
Go to Market – IntelliSpeX's full court press to the product led growth strategy market is perfectly timed.

Business Model & TAM – A simple per user fee and a freemium launch support a two-pronged enterprise and product led growth strategy. IntelliSpeX is slashing the friction out of the sales process.

At \$20 per client, the figure shows IntelliSpeX's TAM.

Traction and Market Plan –

- A critical mass of twelve \$50M – \$100M revenue GCs engaged in trial to create the scalable sales plan. Back log of clients in waiting that is growing 100% per month require more capital and people for conversion.
- Marketing team testing dozens of messages monthly on social media and SEO and has achieved early breakout engagement.

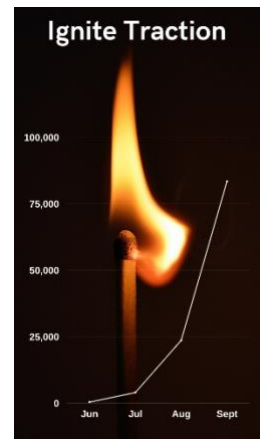


IntelliSpeX's field testing of mini messages with clients and to the market led to a July pivot to a user focused "stress" message...

- Impressions skyrocketed
- 2x page views on the same budget
- 3x followers on LinkedIn
- 3 x CTA conversions for leads

IntelliSpeX is scrambling to increase marketing resource, advertisements, supporting user facing feature changes, and client facing scaling effort – the purpose of our capital ask.

Capital is being applied to mature defining organic and ad driven sales and user volume with a combination of direct to enterprise and product led growth efforts.



Financials

	21-22	22-23	23-24
Year End Annualized ARR	\$ 2,901,636	\$ 8,869,668	\$ 23,735,652
Year Ending Revenue	\$ 1,025,114	\$ 5,370,053	\$ 15,941,144
Total Expenses	\$ 2,765,451	\$ 4,380,658	\$ 7,727,049

COMPANY OVERVIEW

PROBLEM/OPPORTUNITY: Currently there is a sensitivity trade-off with point-of-care tests leading to false negative rates of over 50%. As such, negative samples are sent to the reference labs for confirmatory testing. This is expensive, takes multiple days for results and leads to disease spread.

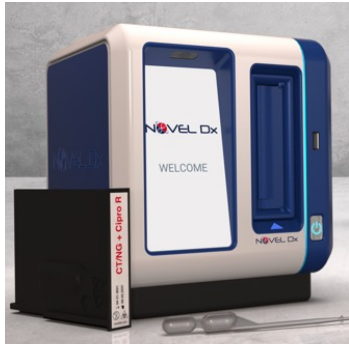
SOLUTION: Novel Microdevices, Inc. (NMD) has developed a next-generation Point-of-Care (POC), CLIA-waived rapid molecular diagnostic test with a major competitive advantage: integrated & automated sample preparation that achieves the accuracy of a laboratory test in under 25 mins.

Integrated sample-preparation enables the widest possible range of pathogen detection (fungi, bacteria, viruses) from a wide range of sample types (blood, urine, saliva and swabs).

The **low-cost instrument/cartridge system** is easily adopted by CLIA-waived setting and brings a new revenue stream to urgent care and physician offices that normally pass diagnostic profits on to centralized laboratories.

Developed with a market focus for Sexually Transmitted Infections (Chlamydia/Gonorrhea) and antibiotic resistant gonorrhea. COVID-19 is near-term EUA launch opportunity.

NOVEL DX PLATFORM



Rapid

Results in 25 minutes or less

Easy to Use

Automated, CLIA-waived

Accurate

Equivalent to lab test

Connectivity

Synced to the Novel Dx cloud

Stackable Design

For increased throughput

Multiplexed & Flexible

LAMP/PCR Multiple targets per test; broad sample types

Ultra-portable

Weighing <4 lbs; battery powered

Low Cost of Goods Sold

\$200 COGS instrument; \$5 COGS cartridge

Easily Adopted

Billing uses established CPT codes (87491/87591) for CT/NG and 87635 for COVID-19

Powered by **CARB-X**

CARB-X, a consortium of *BARDA, Wellcome Trust, Gates Foundation* and others, has awarded **NMD** a ~\$14 million grant for further development of its Dx platform and tests for sexually transmitted infections.

Company: Novel Microdevices, Inc.

Headquarters: Baltimore, MD

Contact: andrea@novelmicrodevices.com

HIGHLIGHTS

- **Intellectual property** covers sample processing devices, self-contained microfluidic system and rapid sample processing methods. **IP Counsel: FisherBroyles**
- **Funding:** \$3M Seed; \$16.2M in non-dilutive grants.
- **Key opinion leader (KOL) clinical collaborators at Johns Hopkins University** for the development of a multiplex rapid molecular diagnostic test for STDs Chlamydia and Gonorrhea.
- **Novel Dx** will apply for US EUA approval for the detection of **SARS-CoV2** in 1H 2022.
- Next in the **NMD** pipeline is a **multiplex Influenza A/B, RSV, SARS-CoV2** assay (Novel Dx respiratory assay panel) with a launch in 2H 2022.
- Third, a multiplex test for the detection of **Chlamydia and Gonorrhea** with a 1H 2023 launch.
- Fourth, a multiplex test for the detection of **Gonorrhea strains with drug resistance** to fluoroquinolones and cephalosporins with a 2H 2023 launch.
- US COVID market is currently tracking at \$8 billion/yr
- Global Infectious diseases market is \$31 billion
- Global sexually transmitted disease market \$17 billion
- CT/NG market had over 56 million annual tests in the US in 2019 creating a \$2.5 billion market opportunity.
- POC market expected to reach \$17 billion by 2022

LEADERSHIP TEAM

Andrea Pais, CEO: Co-founder; electrical engineer with 12-years experience in microfluidics / biosensing technologies.

Rohan Pais, VP Engineering: Co-founder; mechanical & electrical engineer, robotics, biosensor product development expertise

Hamdi Joda MBBS, PhD, Director of Assay Development: developmental experience in microfluidics and isothermal assays

Julie Wilkinson, MS, VP of Product Development: 25 years of experience developing platforms, assays for FDA class I-III diagnostics

Shree Koushik, PhD, RAC: Molecular Biologist and Regulatory expert with extensive experience in In-vitro Diagnostics

Joseph Swiader, Interim CFO: life sciences entrepreneur, investor, portfolio manager with 29 years industry experience.

FINANCING \$2 M Bridge to Series-A, Convertible Note

USE OF FUNDS Complete development of “design-lock” instrument and cartridge that will be used for clinical studies



Qore Health – Delivering State of the Art Telehealth Diagnostic Solutions

Company Background:

After 10+ years of implementing telehealth diagnostic solutions for healthcare institutions and governments, by way of operating other manufacturer's technologies and understanding the gaps and shortcomings of those solutions, Qore Health's Founder and CEO made the decision to develop a next generation telemedicine solution.

The Qore Health solution leveraged new technologies in the marketplace and when integrated it would significantly improve telehealth diagnostics for the benefit of healthcare providers as well as the patients they serve.

Leadership Team:

Diego N. Zambrano, CEO serial entrepreneur with strong technical knowledge and operational skills, including 3 successful exits.

Paul Rapisarda, (candidate) CFO 25+ years of C-suite public experience and deep Investment Banking skills.

Andrea N. Diaz, Regulatory Director, leading FDA & CE Mark approvals.

Dr. Manuel Grandal Martin, MD, Chief Medical Officer, Director of Telemedicine Department for the City of Madrid.

Xavier Pardo, EVP of Business Development, former Medtronic Senior Executive.

Products/Services:

Qore Health provides hospital grade diagnostics in a mobile telehealth platform. Our users are able to capture and deliver voice, video and data from patient to doctor on-the-go and in real-time. To Qore Health's knowledge, this solution is the only offering in the market that delivers hospital grade vitals remotely, portable, and mobile, captured from the patient's body and delivered directly to a physician that can be located anywhere in the world.

Technologies/Special Know-How:

Software Design, Engineering Skills and Telecommunication Engineering Skills combined with medical device manufacturing, led to our design, an integrated hardware/software platform delivering the real-time transmission peer-to-peer via TCP/IP of medical data providing hospital grade diagnostics.

Market:

Home Health Care Providers, Rural and Island Health Care Providers, Nursing Homes, Schools, Military (International & Domestic), Prisons, Police, First Responders.

Distribution Channels:

Global business partners (ex, Schiller, AG), Country specific Partners, Home Health Care Providers, Vertical Specific Partners (Ex. US DoD, Prisons, Hospitals, Integrators Serving the Health Care Industry).

Competition:

Direct: *GlobalMed, Phillips, Iron Bow Healthcare, Stryker, Comitas.*

Indirect: *Teladoc and a growing number of video conference health consulting players.*

Projections:

Year 1 Revenue \$2.5M (supported by awarded contract of \$2M) growing to \$82M year 5; \$82M Revenue Target Assumes an additional growth funding round in late 2022.

Quick Facts

Company Name: Qore Health Inc.

Contact:

Diego N Zambrano,
CEO & Founder
dzambrano@qorehealth.com

Address: 1395 Brickell Avenue,
Suite 800, Miami, FL 33131

Phone: 305.206.5050

Industry: Telehealth Diagnostics

Domain: www.qorehealth.com

Bank: Wells Fargo

Law Firm: Fowler, White, Burnett

Number of Employees: 8

Leadership Team:

Diego N Zambrano, Dr. Manuel Grandal, Paul Rapisarda, Xavier Pardo, Andrea N Diaz.

Amount of Financing Sought: \$2M

Current Investors:

Management and 3 outside investors with \$2.7M in paid capital

Use of Funds:

Execute Awarded Contract of \$2M, FDA Approval, CE Marking Costs, Operations, Product Development

Accountant:

Hurtado & Harnisth, LLP



Value Proposition

Company Background: Real Science specializes in the research, development, production, and distribution of forward-thinking interventions to address chronic and acute healthcare needs in the pharmaceutical and nutraceutical markets, driven by the scientific community’s evolving understanding of the endocannabinoid system and the unexplored commercial opportunities that exist.

Leadership Team: Justin Molignoni, NP, CEO; Dr. Tom Piccarello, PhD; Dr. Damean Freas, DO, CMO; Dr. Deb Kimless, MD, CSO; Colin Kelley, CFO; William Valois, VP

Products/Services: Led by a robust team of seasoned healthcare professionals, we have created a real solution to treat pulmonary inflammation at its root cause with our novel nebulized medication for which we are seeking FDA approval. There are over 800 million people worldwide that suffer from an acute and/or chronic lung inflammation condition(s), such as COVID-19, COPD, and asthma. Currently as there are no root cause treatments, many of these individuals rely on over 10 medications daily just to find any type of relief. The current gold standard of treatment for lung inflammation, inhaled corticoid steroids, have severe acute and chronic side effects that at times can even put patients’ lives in jeopardy. However, providers have no other safe or effective targeted tools in their toolbox to address these conditions. Real Science’s nebulized formulation works naturally with the body’s underlying systems that modulate and regulate the inflammation response. By working in tandem with the body’s natural inflammation response, we can provide excellent and safe anti-inflammatory effects without all the side effects from steroids. Additionally, since we work on the foundational level for inflammation, we can also prevent and treat the most severe forms of lung inflammation, ARDS - now referred to as “COVID lung”.

Technologies/Special Know-How: The patented chemical formulation, forms what is known as a Polar Adaptive Molecule, begins working immediately after use, first by addressing inflammation of the lungs on contact and then systemically by our technology allowing for a 700-fold increase in absorption across the lung field. Once absorbed, it immediately begins working with the endocannabinoid system to treat lung inflammation through several cascade effects. A few examples are selective COX-2 inhibition, down regulation of PPAR-gamma binding, modulation of alveoli macrophages for prevention and reduction of pulmonary fibrotic changes.

Market: Those who are diagnosed with a pulmonary (lung) inflammation condition - acute or chronic. Currently, there are over 800 million individuals in the world suffering from lung inflammation conditions such as COPD, COVID-19, asthma, pneumonia, and cystic fibrosis. These numbers will only continue growing larger by the year. Prior to COVID-19, COPD was the 3rd leading cause of death in the US. Many forecasts put the overall market over 900 million people by the end of 2023. In the US alone, there are over 300 million COPD patients, 334 million asthma patients, 219 million COVID-19 patients, and over 200 million pneumonia cases each year.

Financial Projections: (Unaudited - N. American Market COPD Only)

Table with 6 columns: Revenue, EBIT (Dollars in Thousands), 2024, 2025, 2026, 2027, 2028

Quick Facts

Company Name: Real Science Inc.

Contact: Justin Molignoni, NP, CEO

Address: 157 Baltimore Street, Cumberland, MD 21502

Phone: 717-433-5390

Email: jmolignoni@realscienceinnovations.net

Website: https://realscienceinnovations.net

Industry: Biotech, Life Science

Domain: Biotech, Life Science, Pharmaceutical Development

Law Firm: DLA Piper

Patent Estate: 1 Chemical Composition

Number of Employees: 10

Leadership Team: Justin Molignoni NP, CEO, Colin Kelley, CFO, Dr. Deb Kimless, MD, CSO, Dr. Damean Freas, DO, CMO, William Valois, VP, Bill Freas, VP

Amount of Financing Sought: \$7,500,000

Use of Funds: Human Toxicology, FDA Application, Human Clinical Trials (Marshall University already committed)



September 20, 2021

Executive Summary

Reverse Ionizer LLC (RI) has developed an advanced non-thermal plasma-based technology that in laboratory and field testing has proven to provide superior control of bacteria in cooling tower systems of buildings over traditional chemical treatment and is moving towards the commercialization phase.

The *Association of Water Technologies* (AWT) featured RI's **Plasma Disinfection System (PDS)** peer-reviewed technical paper in its current 2021 journal issue - *the Analyst*.

A short video of the PDS technology and its market can be viewed at :

<https://youtu.be/kEN7N4MWO7A>

RI is seeking gap funding as it prepares its upcoming Series A funding in the amount of \$5.0 M - \$7.5 M

Contact: Patrick Hughes, CEO 703-403-7256

Overview

Like Keurig and Dyson, we disrupt and lift tired categories with innovative, aspirational appliances that deliver *wonder, joy and excitement*. Revolution Cooking is a platform technology company focused on disrupting the \$70B global small kitchen appliance market. We will liberate 1.5B global consumers from the same tired cooking appliances powered by 19th century technology with our high-performance cooking innovations they love and passionately promote.

Our Innovation

We invented the InstaGLO™ heating system in 2019 to eliminate long preheat times, accelerate toasting and cooking time by 40%, consume less power, deliver consistent, even results and retain 40% more moisture and flavor.

Our Products

We launched the Revolution InstaGLO™ Toaster in late 2019 with Williams-Sonoma, exceeding their sales projections by 90%. **We became the #1 selling toaster SKU >\$40 on Amazon in 2020**, outselling Breville, Kitchenaid and other major brands. We will launch the Revolution InstaGLO™ Oven in 2022 to

disrupt the \$16B global microwave and convection oven industry. This connected machine will cook “oven quality” food with microwave speed, eliminate 12 cooking appliance categories from the kitchen counter and aggregate *never-before-gathered* consumer behavioral data that we will monetize with the \$635B CPG industry.

Key Highlights

- \$11,000 per minute on QVC
- Sold 1,000 units in 10 minutes - ABC's “The View”
- 15+ retailer/e-tailer distribution
- 5 issued global patents (1 utility, 4 design)
- 60M organic views, 10M “likes”, 500K shares on social media
- Rave reviews on Tech Crunch, CNET, Martha Stewart, Oprah, and many more
- Impressive 4.5-star rating since launch
- International expansion next year

Key Industry Statistics

- \$3.2B + Global Toaster Market (TAM: 10M -50M U.S. homes)
- \$16B + Global Microwave/Convection Oven Market (TAM: 50M U.S. homes)
- \$635B Consumer Packaged Goods (CPG) Industry seeks to go direct
- 800M hotel breakfasts per year (U.S.) with self-serve toasters
- 150,000 C-stores (U.S.) with ovens

Funding Target	\$15,000,000
Funding Round	Series A Preferred
Pre-Money Valuation	\$50,000,000
Previous Rounds	\$28,680,011 (Series Seed)
Co-Investors	Entrepreneurs/Super Angels (+ \$5M committed to Series A)
<u>Use of Proceeds</u>	<u>Grow distribution/Launch oven</u>
Working Capital	\$ 6.5M
OpEx	\$ 8.7M
Transaction Expenses	\$ 1.2M
CapEx	\$ 0.3M
<u>Net Contribution Profit</u>	<u>(\$ 2.0M)</u>
Net Use of Proceeds	\$14.7M

Management Team

Tom Klaff, Co-founder/CEO	Phil Carbone, VP, Engineering
Dean Duffy, COO	Elizabeth Jackson, EVP, Marketing
Allen Hollingshead, CRO	Chris Dingee, VP, Finance

Advisors

John Whoriskey, President, Keurig/Green Mountain (Retired)
Carlos Barroso, Global Head of R&D, Campbell, Pepsico (Retired)

Sector	Consumer Appliance, IoT
Website	https://revcook.com
Law Firm	DLA Piper (Jeff Lehrer, Esq)

Key Financials

	2020(A)	2021(E)	2022 (E)	2023 (E)
Revenue	3.99M	8.86M	29.39M	65.40M
EBITDA	(5.97M)	(7.07M)	(3.76M)	4.11M



www.surgiquality.com
www.surgiconnect.com
www.surgiprice.com

Sanjay Prasad MD FACS
 c. 3018073840
sprasad@surgiquality.com
 9715 Medical Center Drive, Suite 201
 Rockville, MD, USA 20850

MANAGEMENT TEAM

Founder & CEO: Sanjay Prasad MD FACS
 Clinical Assistant Professor
 George Washington University Hospital

Author, [Resetting Healthcare Post COVID19](#)
 Pandemic: The Patient Handbook,
www.resettinghealthcare.com

COO: Jack Nelson
 Customer service champion
 (Former COO Coventry Health, 11M
 members, CareFirst BCBS, CVS Caremark)

VP Engineering: Sathya Venkataraman
 (Formerly with Centene)

Board of Directors:
 Sanjay Prasad MD
 Karen Ferrell,
 (Former Aetna, Cigna, Prudential Executive)
 Tim Meyers

INDUSTRY

Healthcare Technology

TOTAL ADDRESSABLE MARKET

\$100,000,000,000

STRATEGIC RELATIONSHIPS

Medical Cost Sharing Plans
 Third Party Administrators (TPAs)
 Blue Cross Blue Shield Health Plans
 Labor Unions
 National Surgeon, Surgery Center, Hospital
 Networks
 America's Choice Provider Network (ACPN)

CURRENT INVESTORS

Sanjay Prasad MD invested \$2,000,000
 Other surgeons: \$635,000

FUNDING TO DATE

\$2,635,000

Series A: VC Term Sheet, \$3,000,000,
(Expected Closing 9/2021)

FINANCING SOUGHT

\$1,500,000 Convertible Note, (30% discount,
 valuation cap \$13M) \$1,275,000 remaining

LAW FIRM Cooley LLP

COMPANY DESCRIPTION

SurgiQuality forces surgeons, surgery centers and hospitals to compete for surgical patients using all-inclusive bundled pricing and surgeon outcomes.

Problem:

The referral from primary care physician to surgeon is not being made based on cost or surgical outcomes. As a result, patients fall victim to surgeries they do not need or are connected to low quality surgeons and suffer complications and need for revision surgery.

Black patients experience worse surgical outcomes than white patients, because of referral to low quality surgeons, and these differences persist even when you control for extent of disease or co-morbidities.

Because of the pause in surgery scheduling in 2020, the COVID19 pandemic has created an unexpected opportunity to reset surgical healthcare in the US.

Solution:

A personalized concierge helps upload patient records to the SurgiQuality HIPAA-compliant cloud, for distribution to surgeons through the SurgiConnect app. After review, surgeons validate medical necessity, report on their past experience with the procedure (# of cases performed, success rates and complication rates) and, with their facilities, state a bundled price.

Patients choose their surgeon based on cost, surgeon's past outcomes, and convenience.

Value Proposition

Patients

Prevent unnecessary surgery
 Explore alternatives to surgery
 Connect to high outcome surgeons
 Zero deductible options

Employers, Health plans

Reduce costs and with higher quality
 Avoid Catastrophic Claims

Surgeons, Surgery Centers and Hospitals

Access to new surgical cases
 Prompt payment

BUSINESS DEVELOPMENT

Contracted with **Soleer.io** comprising 200 lives onboarding to begin 10/2021

Strategic Partnership with **America's Choice Provider Network (ACPN)**, 30,000 surgeons, 300 surgery centers and hospitals

Comcast NBCUniversal (200,000 EE/ 500,000 lives) Final Negotiations

AT&T (230,000 EE/ 1,000,000 lives) Advanced conversations

Walmart (1,600,000 EE, 3,000,000 lives) In conversation

CareFirst Blue Cross Blue Shield (3,500,000 members) Interested in using the platform

Horizon Blue (NJ Blue Cross Blue Shield) (3,800,000 members) Advanced conversations

Blue Cross Blue Shield Association (37 BCBS plans with 60,000,000 members) In conversation.

Racial Disparities with Surgical Outcomes

Black patients have poorer surgical outcomes than white patients, even when controlling for socioeconomic status, extent of disease, insurance status and co-morbidities.

SurgiQuality is the solution to these racial disparities.

Surgical case records are anonymized with respect to name, race, and ethnicity, before they are sent to surgeons, surgery centers and hospitals, thereby eliminating bias. SurgiQuality levels the playing field for black patients seeking surgical services.

No employer, health plan or labor union can choose to ignore the SurgiQuality solution.

Business Revenue Model

1. Per employee per month subscription fee
2. Concierge Fee per case
3. Savings Percentage Share

\$1000s	Year 2021	Year 2022	Year 2023	Year 2024	Year 2025
Total Revenue	\$ 1,981	\$ 31,138	\$ 62,199	\$ 93,260	\$ 124,321
Gross Profit	\$ 1,618	\$ 27,508	\$ 55,943	\$ 82,959	\$ 110,133
EBITDA	\$ 947	\$ 22,487	\$ 49,834	\$ 75,568	\$ 101,348

"The forecasts are not guaranteeing performance. They are forward-looking statements that are subject to a number of risks, uncertainties and assumptions and should be read with caution. These forecasts are subjective in many respects and thus are susceptible to interpretation and periodic revision based on actual experience and recent developments. While presented with numeric specificity, these forecasts reflect numerous assumptions made by our management with respect to industry and financial conditions and other matters, as well as general economic conditions, many of which are beyond our control. Accordingly, our actual results may vary significantly from these forecasts."



VERAX RESEARCH SERVICES INC.

September 20, 2021

CONNECTpreneur Corporate Executive Summary

Business Objectives:

- Become the #1 Accreditation / Certification service in the CBD and Supplement* Market
- Lead the industry in discovering the Truth** about CBDs and Supplements

** Includes human, pet, and equine markets*

*** In Latin "Verax" means conveying the truth*

Why Invest in Verax Research Services Inc. Now!

- S-1 filing with the SEC in three weeks
- A major New York Investment Bank has vetted Verax and is contracted to manage our IPO
- A limited number of pre-IPO shares are still available and will be closed once the S-1 is filed
- A dedicated management team with decades of product/service experience, managing public companies, laboratory science research, education development, and pharmaceutical experience

More detailed information can be found at <https://www.veraxresearch.com/investor-portal>

Contact Information:

Dr. Renato Cataldo, CEO
r.cataldo@veraxresearch.com
314-330-8077 (m)



ATTENDEES

SPEAKERS

First	Last	Title	Company
Tien	Wong	Chairman & CEO	Opus8, Inc.
Julie	Coons	President & CEO	Northern Virginia Chamber of Commerce
Kara	Mayle	Regional General Manager	Tower Club Tysons Corner
Esther	Lee	CEO	Refraction

PRESENTERS

First	Last	Title	Company
AEG			
Mark	Haas	CEO	AEG
John	Yetman	Co-Founder	AEG
Lyka	Aldemita	Executive Assistant	AEG
FireBot			
Mark	Baldino	CEO	FireBot
Paul	Walton	Vice President	FireBot
Suzanne	Baldino	Sales	FireBot
IntelliSpeX			
Blake	Ratcliff	CEO	IntelliSpeX
Scott	Kushino	Investor Relations	IntelliSpeX
Novel Microdevices			
Andrea	Pais	CEO	Novel Microdevices
Steve	Yannaras	Medical Advisor	Novel Microdevices
Qore Health			
Diego	Zambrano	CEO	Qore Health
Clara	Mejia	Executive Assistant	Qore Health
Darren	Womer	CEO	National Capital Companies, Advisor to Qore Health
Real Science Innovations			
Justin	Molignoni	CEO	Real Science Innovations
RevCook			
Tom	Klaff	CEO	RevCook
Reverse Ionizer			
Patrick	Hughes	CEO	Reverse Ionizer
SurgiQuality			
Sanjay	Prasad	CEO	SurgiQuality
Marshall	Besch	Data Operations	SurgiQuality
Verax Research Services, Inc.			
Renato	Cataldo	CEO	Verax Research Services, Inc.

ATTENDEES

First	Last	Title	Company
Noah	Abramowitz	Product Manager	I Got It
Steve	Abramowitz	CEO	CEO Boardrooms
Steve	Abromowitz	CEO	CEO Boardrooms
Sean	Adler	CEO	GZI
Imran	Aftab	CEO	10Pearls
Emily	Alcorn	Associate	CBRE
Brian	Alexander	CEO	Omina Technologies
Rachel	Alexander	Founder	Omina Technologies
Taka	Amano	Co-Founder/CEO	American Shochu Company
Dylan	Anderson	Executive Director	JPMorgan Chase & Co.
Walt	Anderson	Founder & CEO	AVEALTO Ltd.
Rich	Andrews	Entrepreneur	SRA Technologies LLC
Narcisse	Atchamou	Category Manager	DC Water
Darrin	Auito	Partner	HEA
Larry	Austin	President	Starwalker LLC
David	Bain	Executive Director	Technology Integrity Council
Mark	Baldino	CEO	Firebot Suppression
Albert	Baldwin	Founder/CEO	Alfa Omega GRAFX LLC
Vanessa	Barksdale	Founder	Modernist Communications
Tim	Batchelor	Member	Open Road Capital
Doug	Beekman	Director	EnhancedCapital
Laura	Beldin	Senior Vice President	Bank of America Private Bank
Lawrence	Bell	Principal	Advisors Solutions, LLC
Ray	Benton	CEO	JTCC
Urvashi	Bhatnagar	Vice President	Genpact
Demir	Bingol	CEO	mPathix Health
Dan	Blaine	Consultant	Marsh & McLennan Agency
Richard	Bodson	President & CEO	SysNet Technologies, Inc.
Maurice	Boissiere	Chief Customer Officer	DataTribе
Dominic	Boles	Managing Member	DH Partners, LLC

Hal	Boles	Senior Advisor	DH Partners, LLC
Anthony	Bolling	Director	KW Commercial
Gore	Bolton	CEO	Land Intelligence
Michael	Brick	Senior Vice President	UBS Financial Services
Linda	Broenniman	CEO	Radiate Buzz
Joe	Brookman	CEO	Brookman LLC
Jeff	Brouse	Senior Membership Director	Tower Club
John	Brown	CEO	Blankit
Tyler	Brown		
Patrick	Bryant	Co-Director	Startup Grind DC
Peter	Buchanan	Managing Partner	NewPlan, LLC
Craig	Burris	Founder	SALESROCKET
Laura	Butler	Board Chair	Hispanic Alliance for Career Advancement
Laura	Cadena	Board Member	HealthChain
Ignacio	Calles	CFO	("Currently Working Independently")
Kaitlin	Capobianco	Community and Recruitment Manager	Halcyon
Sue	Carr	CEO	CarrTech
Julia	Catuara	CFP	New York Life
Sean	Cease	Senior Consultant - Innovation	U.S. Dept. of Health and Human Services
Andy	Chalonec	Founder	Cost Caddies
Barb	Chan	CEO	Koolooks
Ritvika	Chandra	CEO	Adbeat Strategies
Michelle	Chapman	Senior Consultant	Benecurv
Ben	Chen	Senior Associate	Alpha Royale Commercial Group
William	Classen	Assistant Vice President	Colliers International
Melanie	Coburn	Chief Relationship Officer	Cadre
Timothy	Coffin	President	Celtiq, LLC
Michael	Cohen	Senior Vice President	AIG
Bill	Collins	Chairman and CEO	The Collins Company LLC
Domenico	Conti	Corporate Controller	Rosenthal Automotive
Seth	Coombs	Chief Commercial Officer	GENIXUS
Susan	Coots	Financial Services Professional	New York Life
Dave	Coriale	President	DelCor Technology Solutions
Judith	Costello	Special Projects Manager	Office of the County Executive
Amy	Cousins	Agent	New York Life
Kimberly	Crowell	Managing Director	Potomac Partners & Associates
Daniel	Crystal	Research Specialist	Gartner
Devon	Cury	Director of Advanced Markets	First Financial Group
Brian	Darmody	Associate VP	University of Maryland
Mona	Davis	Manager of VC Portfolio Analysis	CIT
George	Davis	Executive Vice President	Evergreen Advisors
Firaas	Deak	CEO	Lucky Strike App
Peter	Dean	Senior Vice President	Lockton Companies
Hank	Dearden	Principal	Group 3D
Holly	DeArmond	Managing Director	Dingman Center for Entrepreneurship
Sloan	Deerin	Managing Director	Janney Montgomery Scott LLC
John	DeGross	Business Consultant	Fiserv
Vince	Deng	President	SAPA-DC
Sam	Diener	Managing Partner	Early Light Ventures
Vic	Diloreto	CEO	Blackmarker
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