



Big  Idea  
CONNECTpreneur  
PREMIUM

October 17, 2023

Washington DC



# Agenda

Tuesday, October 17, 2023

**8:00 - 9:30 am - REGISTRATION / NETWORKING**

**9:30 - 9:40 am - WELCOME REMARKS**

S. TIEN WONG - CEO, Opus8; Founder, Big Idea CONNECTpreneur Forum

NISHAUD RAJCOOMAR - General Manager, The City Club of Washington

**9:40 - 10:10 am - COMPANY SHOWCASE / ROCKET PITCH**

6 Promising Early Stage Companies will be introduced by:

ANTHONY MILLIN - Founder and Co-Chair, NEXT, powered by Shulman Rogers

MARK HAAS, CEO, Association for Enterprise Growth

## PRESENTING COMPANIES

AGED Diagnostics

Coagulation Sciences

Couple.com

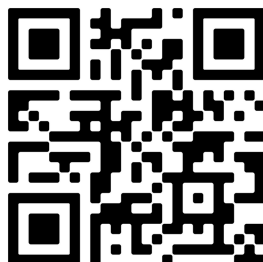
D3 Unified Communications

Novel Microdevices

Osprey BioScience

**10:10 am - Noon - NETWORKING**

**VIEW A LIST OF ALL  
RSVPS FOR TODAY'S  
EVENT HERE!**



# Speakers



## **TIEN WONG, CEO, OPUS8, INC.**

Tien is Founder and Host of the Big Idea CONNECTpreneur Community, a global community of 30,000+ investors, entrepreneurs, business leaders and service professionals. He is CEO of Opus8, an investment and advisory firm which helps tech companies and investment fund managers raise capital. He is also Chairman of Lumious, a leading Ed Tech Company. Tien co-founded and served as CEO of CyberRep, Inc. until its acquisition by ACS/Xerox. CyberRep was one of the largest CRM companies in the world with over 2,300 employees and \$80 million in revenue. Today, the CyberRep/ACS business generates \$3+ billion in revenue as divisions of Xerox, Conduent, and Continuum. He serves on the boards of The Washington Institute for Business, Government & Society; Frederick Innovative Technology Center, Inc. (FITCI); Junior Achievement; Association for Enterprise Growth; and Austin Venture Association. He was appointed by Governor Martin O'Malley to the Maryland Venture Fund Authority which manages \$84 million in venture capital. He is an Entrepreneur in Residence at Georgetown University's McDonough School of Business, and a graduate of Dartmouth College.



## **NISHAUD RAJCOOMAR, GENERAL MANAGER, THE CITY CLUB OF WASHINGTON**

A highly motivated and hardworking individual, having more than nine year experience in the field of Management & Finance | Hospitality | Guest Satisfaction | Operational and Service Excellence | Achieved Maximum Profitability



## **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, edtech, 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. Anthony also serves as a Venture Partner at Urban.Us, a seed stage VC firm. Contact Anthony at [amillin@shulmanrogers.com](mailto:amillin@shulmanrogers.com).



## **MARK HAAS, CEO, AEG**

Mark Haas is Co-founder and CEO of AEG (Association for Enterprise Growth), responsible for strategy, operations, and expansion of its communities to 30 cities nationally. He was previously President of ROM a strategy and operations management consulting firm, advising CEOs and boards to include 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 \$120 million nonprofit, merging two scientific associations, re-organizing a biomedical research agency, facilitating development of WWIV military strategy, and of facilitating a global R&D strategy for the US Navy.

# AGED Diagnostics Executive Summary

AGED Diagnostics is using genomic innovation to develop the most accurate blood test for liver disease to help physicians keep patients in the monitoring program, reduce the financial burden for health insurers and improve patient outcomes through early detection and intervention.

## Problem Statement

While 1 in 3 (100 million) Americans have liver disease, many are unaware until the disease has progressed to later stages at which time the disease is no longer curable, patient outcomes are poor and healthcare spending can cost up to \$1,000,000 per patient.

**\$1,000,000** Healthcare spending per patient for late stage diagnosis

## Economic Burden

Annually, US health insurers spend \$108 Billion on management for nonalcoholic steatohepatitis (NASH, liver disease) and an additional \$184 Billion as a societal burden, calculated as the monetary value to quality of life-years lost due to liver disease.

## AGED Solution

AGED is developing the most accurate blood test that can differentiate benign from advanced liver disease and simultaneously stage fibrosis (liver scarring) through a targeted genomic sequencing assessment.

## Competition

The sole diagnostic tool for NASH is a liver biopsy, which is expensive, invasive, prone to sampling error, and bleeding. Imaging tools fail in nearly 60% of patients. There are few effective noninvasive & accurate tests that can *diagnose* NASH.

**60%** Of the time imaging tools fail to diagnose NASH in patients who have the disease

## Competitive Advantage

AGED methods is the first and only accurate, non-invasive tool that can diagnose NASH and stage fibrosis. Other serum tests target markers found in benign liver disease, our proprietary methods alleviate challenges by targeting markers highly specific to NASH and fibrosis.

## Traction

- Q1, 2019 NSF Grant, NSF ICorp
- Q3, 2020 Healthworx CareFirst BlueCross BlueShield (BCBS) Fellowship
- Q4, 2020 Filed full PCT (international) patent  
Presented work at Annual Liver Conference  
Published work in Hepatology
- Q3, 2021 Closed Pre-Seed Round
- Q3, 2022 Pilot Study, validated core technology in the lab in patient plasma samples

## Path to Commercialization

- Q1, 2023 R&D test method verification, expand sample size
- Q1, 2024 Clinical Trial VCU
- Q3, 2024 CLIA Approval  
Acquire Codes & Coverage
- Q3, 2025 Market Launch (Q1-Q3)

**\$3.5 million**

Additional funding to Achieve Path to Market

## Financial Projections

Target Market (TM) 25 million patients  
\$700 per unit

- Year 1 0.025% TM, 3 physicians, 5,000 patients, Revenue \$3.5 M
- Year 3 0.25% TM, 30 physicians, 50,000 patients, Revenue \$35 M
- Year 5 1.25% TM, 150 physicians, 250,000 patients, Revenue \$175M

## Team



**Rachel Zayas**  
Geneticist, Masters of Science and Business, Founder CEO



**Mayisha Rahman**  
Biotechnology Research Associate



**Dr. Bongsoo Park**  
Bioinformaticst, Lead Bioinformaticist



**Arun Sanyal, MD**  
Hepatologist, Virginia Commonwealth U. Clinical Collaborator



**Naim Alkhouri, MD**  
Hepatologist, Director Fatty Liver Program Clinical Collaborator



**Coleman Irving Smith, MD**  
Transplant Hepatologist, Georgetown Clinical Collaborator

**Interested in learning more?**  
Contact us at [info@ageddiagnostics.com](mailto:info@ageddiagnostics.com)



# COAGULATION SCIENCES

## Breakthrough in Blood Transfusion Management

### INTRODUCTION/ ONE-PAGE EXECUTIVE SUMMARY

**Clinical Problem:** Research indicates 40% - 59% of blood transfusions are unnecessary. This results in needless complications such as allergic reactions, lung injury, fluid overload, immune system damage resulting in infections, prolonged hospitalization, and shortened lifespan. Hospitals lose approximately \$800 for each unit transfused in the inpatient setting while insurance companies lose billions annually.

**Unmet Need:** Unnecessary transfusions occur most often during major bleeding. With existing diagnostic tests, it is difficult to determine which blood products to transfuse, in what amount, and even whether blood products are indicated at all. Limitations of existing tests include prolonged time to results, complex and cognitively challenging interpretation, non-specific information and minimal, if any, treatment guidance. There is an unmet need for an easy-to-use test to guide blood transfusion decisions. Key opinion leaders, blood bank directors, surgeons and anesthesiologists confirm the need for Coagulation Sciences' Multiple Coagulation Test System (MCTS).

**The Solution:** Coagulation Sciences has developed the Multiple Coagulation Test System (MCTS™). The system performs 12 blood tests simultaneously, in a disposable cartridge, in approximately 10 minutes, at the point-of-care. It determines which treatments will stop bleeding. No other platform provides this information. Also, MCTS results are extremely easy to interpret.

**Unique Selling Advantage:** The fully-automated MCTS provides more useful information to guide transfusion than existing tests, and does so in ~ 10 mins.

**Business Model:** The MCTS is a platform, with a razor and razor blade business model. Addition of new therapies to the disposable cartridge can expand use from cardiac surgery to trauma and transplant surgery, and assessment of anticoagulants in doctors' offices. Revenue in year four of sales is projected to exceed \$70M.

**The Market:** The global coagulation testing market is projected to reach \$8.8 billion by 2031. The MCTS will not simply enter the point-of-care market, but will at times also replace tests currently performed in hospitals' laboratories and doctors' offices, such as the PT and APTT.

**Research to Date:** In-vitro research validates the underlying technology. Currently, treatment is often empiric, as factor levels cannot be performed quickly. The MCTS provides more information than factor levels in ~ 10 minutes. Research at the Mayo Clinic confirms the relationship between coagulation factor deficiencies and bleeding after cardiac surgery, and results from the study will be used to improve the MCTS technology.

**Intellectual Property:** Coagulation Sciences holds six unique patents.

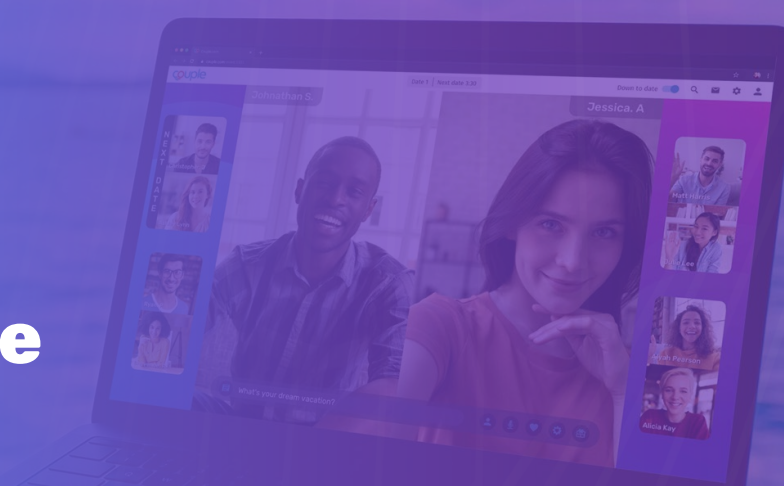
**Summary:** Doctors often select a treatment for bleeding based on an abnormal blood test result, but most tests are non-specific, and can require too much time, while some are difficult to interpret. MCTS results are available rapidly and are easy-to-interpret, and will aid physicians in the management of bleeding patients, improving patient outcomes and decreasing costs.

**For information contact: Sheldon Goldstein MD, CEO**  
[sgoldstein@coagulationsciences.com](mailto:sgoldstein@coagulationsciences.com) 917-363-6542  
4700 Independence Ave. Riverdale, NY 10471



# Pioneering AI-powered romance

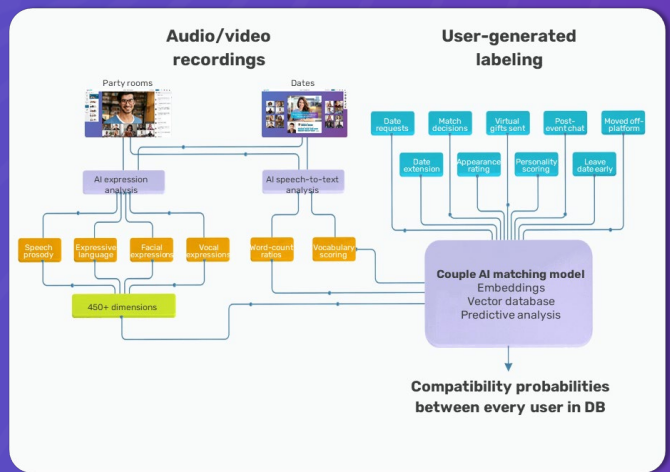
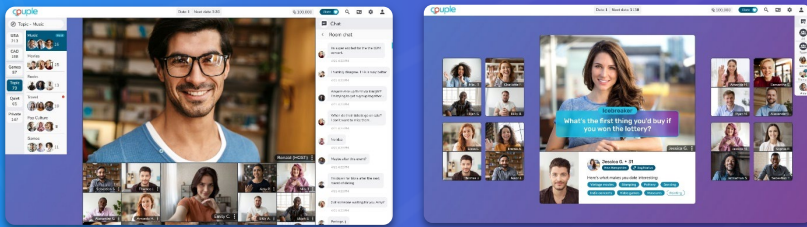
with patented interactive video features



Less than 16% of online dating users find a match each year. For most users, app dating is a lonely experience made worse by bots, scammers, and superficial matching.

Couple's patented online singles parties offers a fun experience with genuine connections and cutting-edge AI matching.

Couple is poised to revolutionize the \$10B online dating industry with the highest quality user data derived from real human interactions and user labeling.



## Couple's advantage

- Authentic data from real human video interactions during online singles parties, ensuring the highest quality data in the industry.
- Patented interactive video tech enables interactive live events at scale.
- Advanced AI-driven Compatibility Vectors ensure precise matching based on our unparalleled data quality.

## Couple's early achievements

- 200+ experience tests
- 100,000+ feedback surveys
- 1,700 concurrent participants
- 82-min event user participation
- 92% positive user ratings
- \$1 beta user revenue per event
- \$6M invested
- 1 patent received
- 3 provisional patents in progress

Targeting breakeven in 2025 and \$1B in revenue by 2028



### Team

Industry leaders from World Media Group, Verizon, and IBM T.J. Watson.



### Ask

Seeking \$8mm in Series A to fund expansion from NYC to 18 major North American cities.

### Contact



rbeswick@team.couple.com



(914) 806-5555



## D3 Unified Communications

**Value Proposition** D3 Unified Communications (D3UC) offers a white label, cloud-based phone and unified communications solution (UCaaS) exclusively for Managed Service Providers (MSPs) serving the Small to Medium Businesses (SMBs) market. By private labeling the D3UC solution as their own, MSPs can compete against major UCaaS providers, like Ring Central and Vonage, and generate monthly profits of 50-100% for themselves while producing growing monthly recurring revenues for D3UC.

**Company Background:** D3UC's founders, veterans in UCaaS, previously scaled a similar company to \$16M in annual revenues between 2005-2013, selling unified communications services through the same channel. Now, they offer a white label UCaaS solution to MSPs serving SMBs, capitalizing on their vast experience.

**Leadership Team:** The D3UC leadership team, with over six decades of combined telecom and tech experience, specializes in Cloud-based phone and Unified Communications for SMBs. As the founding executives of a Cloud-based UCaaS MSP in 2005, they closed \$100M in contracts, serving 100 banks in fifteen states.

**Products/Services:** D3UC's white-label phone and UCaaS solution, tailored for MSPs, is a comprehensive cloud-based UCaaS service with features rivaling premise-based systems. Combined with D3UC's extensive knowledge of UCaaS and local tech support, MSPs are able to generate monthly profits of 50%-100%.

**Technologies/Special Know-How:** The D3UC private-labeled internet portal is the cornerstone to our service delivery model, offering a unified interface (UI) for all tasks. Complementing the UI are a robust Knowledge wiki, excel workbooks, and deep industry experience, creating a compelling whole product solution for MSPs.

**Market:** The Voice over IP (VoIP) market is estimated to almost triple to \$55B by 2025. 91% of all US businesses are considered "very small" because they have less than 20 employees. There are 5.2M very small business (VSBs) owners that depend on MSPs for their telecom, security, and other technology services (see below).

**Distribution Channels:** D3UC's distribution channel *is its target market* – the 50,000+ MSPs who provide technology services to 5.2M Small Businesses Owners with less than 20 employees. They private-label and sell D3UC's unified communications services as their own, and they set the prices for their customers.

**Competition:** Most of D3UC's "white label" competitors have created channel conflicts by also selling to SMBs – the MSP's customers. This is a major cause for concern among MSPs, since they do not want to partner with a company that is also their competitor. MSPs select D3UC because we only sell exclusively to MSPs.

### Quick Facts

**Company Name:** D3UC LLC dba D3 Unified Communications

**Contact:** Chuck Daniels, CEO

**Address:** 230 Springfield Ave. Rutherford, NJ

**Phone:** 973-330-8801

**Email:** chuck.daniels@d3uc.com

**Website:** www.d3uc.com

**Industry:** White Labeled Unified Communications as a Service

**Bank:** Bank of America and M&T

**Law Firm:** Provisor Law & Roth Jackson

**Number of Employees:** 4 Partners

**Leadership Team:** Chuck Daniels CEO, Linda Daniels/COO, Dhruv Parmar/Director

**Amount Financing Sought:** \$250K

**Current Investors:** RIVF, Angel Groups, Angel investors, F&F

**Use of Funds:** Hiring & Marketing

**Auditor:** Lion, Doby & Company

### Financial Projections

	2022	2023	2024	2025
Revenue	\$661,021	\$771,125	\$921,971	\$1,102,325
EBITDA	(\$37,622)	\$85,129	\$134,205	\$202,186

The "S" in SMB Holds a Significant Market Opportunity for Growth

**U.S. Businesses**

**5,205,442**


**Employees**

**20,687,543**

# NOVEL MICRODEVICES

 Andrea Pais

 andrea@novelmicrodevices.com

 352-642-2391

Novel is Democratizing Disease Testing with the most Portable, Rapid (<15 min), Accurate & Affordable PCR platform for any pathogen (viruses, bacteria, fungi, protozoa), and any sample type (swabs, urine, blood, saliva)

## The Challenge

Although accurate, Laboratory PCR tests take days to get the results. Whereas low-cost rapid antigen tests have poor accuracy, leading to false negative rates of over 50%. There are no rapid, accurate and affordable point-of-care diagnostic tests.

## The Novel Dx Solution

A next-generation, patent-protected, rapid, affordable point-of-care PCR multiplex diagnostic platform for infectious diseases and more.



<b>HIGH PERFORMANCE:</b>	Lab-level accuracy with integrated magnetic bead sample purification, concentration & 40-cycle PCR
<b>RAPID:</b>	Sample-to-answer in just <u>10 to 15 minutes</u>
<b>AFFORDABLE:</b>	Instrument COGs: \$500; Cartridge COGs: <\$5
<b>SAMPLE &amp; PATHOGEN AGNOSTIC:</b>	Works with <u>any pathogen</u> (viruses, bacteria, fungi and protozoa) and <u>any sample type</u> including swabs, urine, blood, saliva
<b>MULTIPLEXED:</b>	<u>6-channel real-time detection</u> of 6 or more targets in a single test
<b>SCALABLE:</b>	Fast and easy to develop new assays for <u>rapid pipeline expansion</u>

## Near-term Pipeline

<p><b>Respiratory Panel</b></p> <p>Flu-A/B/RSV/COVID-19</p>  <p>2Q 2024</p>	<p><b>STD Panel</b></p> <p>Chlamydia/Gonorrhea+Res</p>  <p>4Q 2024</p>
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## Market Size

The global infectious disease diagnostic market is estimated to grow from \$28.1B in 2021 to \$39.8B by 2026, a CAGR of 7.2%.

**Respiratory Disease Market: 7 Billion USD**  
**Sexually Transmitted Diseases: 5 Billion USD**

## Razor/Razor Blade Revenue Model

This revenue model is supported by existing CPT reimbursement codes and marketed through multiple sales channels, representing a significant growth opportunity.

## Team & Advisors

 Andrea Pais CEO/CoFounder Co-Inventor	 Rohan Pais VP Eng./Cofounder Co-Inventor	 Hamdi Joda VP Assay Development
 Carlos Aparicio COO	 Joe Swiader CFO	 Todd Ritter Interim CCO
 Robert Storey Board Member	 Eric Van Gieson Advisor	 Caroline Popper, MD Advisor

*Team Members & Advisors - Comprised of diagnostic industry veterans with extensive experience at companies such as Abbott, Becton Dickinson, Biomerieux & Beckman Coulter*

## Funders and Collaborators:

## Current Funding

## Capital Raise

**Capital Raised to Date: \$14.7M**  
**Grants - \$7.7M** (include; RADx, CARBX & NIH)  
**Equity Capital - \$7M**  
**Investment Opportunity: \$6M Series A**  
**Use of Funds:** Design lock, manufacture pilot lots and controlled product launch

## Comparable Company Exits

**Curiosity Diagnostics** acquired by **BioRad** for \$170M, 2022  
**Genmark Diagnostics** acquired by **Roche** for \$1.8B, 2021

*Shaping the Future of Diagnostics*





### Biotoools for Multi-Target Therapies™

4539 Metropolitan Ct  
 Frederick, MD 21704

#### Background

OspreyBio is a DNA biotoools company providing researchers with powerful platform tools to create "multi-target" therapeutic candidates. Osprey's tools use a proprietary modular gene building system called Bird of Prey™ to bring gene and cell therapy into the future.

#### Problem

Most diseases that are the largest causes of death and economic burden are complex and driven by multiple genes. Though single gene diseases are being cured, multi-gene diseases are not being worked on due to the complexities involved in their creation.

- Current clinical trials (~2,000 ongoing) are almost exclusively single target therapies.
- Few platforms enable design of multi-target therapeutic candidates on the market.

#### Solution

Introducing the CloneCard: a novel patent pending DNA delivery tool powered by a modular multi-gene building system called Bird of Prey (BoP) enabling researchers across the industry to simply build complex therapies.

- First simple & accessible multi-gene building platform.
- CloneCard gene libraries are designed to help with research workflows – 8 tabs, 8 genes – fit standard lab wells.
- BoP system does not require genetic engineering expertise. CloneCard and other end-to-end tools to streamline development.
- Enable millions of new gene combinations, opening up great potential for new therapy development.
- Testing multiple genes simultaneously **saves time and money in high-cost research.**



#### Revenue Model, Marketing, & Target Customers

CloneCard sales are accompanied by recurring revenue opportunities that include classes of proprietary, OEM and resale of mRNA, reagents, DNA purification kits, and gel electrophoresis tools & kits. These provide an end-to-end easy cloning and building solution for researchers. In the future, Osprey will also provide licensable CloneCard genes and cell lines.

Marketing strategy is built on an extensive network within academia; 1:1 key opinion leader marketing; conference attendance as a vendor; strong branding, and simple messaging drive digital marketing towards targeted labs (using SciLeads for granular marketing); and a unique brand strategy & identity that helps us stand out from our competitors.

#### Primary Customers

Academia, Government, NGO  
 70.3% basic research\*

~\$77B in government funding  
 to applicable diseases

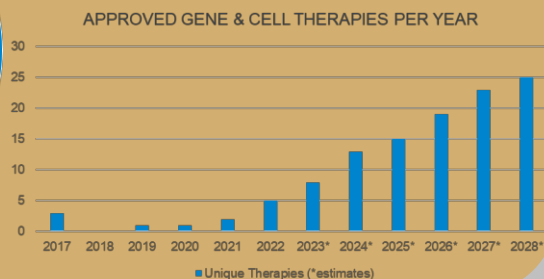
#### Secondary Customers

Private Sector  
 29.7% basic research\*

1,000+ target companies  
 active in relevant discovery activities

#### Dramatic Growth in GC&T Sector

- Gene & Cell Therapy \$37B by 2027 (~40% CAGR)
- Increasing rate of G&C therapy approvals (Est. up to 20+ per year by end of decade)



#### Competition

##### deNovo Synthesis Companies

- High rejection rates due to DNA complexity
- Requires significant expertise to build & design genes.

##### Repositories

- No guarantee of quality – existing genes only
- Expertise still required to build without BoP system.

##### Catalogue Providers

- License-bound – royalty barriers to commercialization.
- Expertise still required to build without BoP system.

#### Osprey Advantages

- All genes on CloneCard have natively built-in BoP system.
- End-to-end toolkits & low cost greatly reduce barrier to entry.
- Customers avoid pitfalls of synthesizing DNA for research.
- Majority of genes are IP-free: no license

#### Timeline

##### 2023

- First sales.
- Expand product portfolio to include products requiring recurring purchases.
- Acquire first customers.

##### 2024

- Create end-to-end kits with OEM and in-house materials.
- Begin manufacturing and sales of MSC cell lines.
- Multi-disease CloneCard portfolio.

#### Seeking \$1M Convertible Note

Minimum investment of \$50,000

#### Use of Funds

Funding will primarily focus on sales & marketing & product portfolio expansion.

#### Financial Projections (Unaudited):

	2023	2024	2025	2026	2027
Revenue	25	513	2,519	7,372	12,000
EBIT (\$ in thousands)	(260)	(542)	241	3,184	7,000

#### Key Personnel

##### Sam Glickstein – Co-Founder & CEO

10+ years multi-disciplinary entrepreneurship background in Ag-Tech, and Biotech. Founder and CEO of acquired company Biotrophics.

##### Dr. Thomas D. Reed – Co-Founder & CSO

20+ years of experience in pioneering, leading, and creating new technologies within the biotechnology space – Founder and previous CSO of Intrexon (now Precigen/PGEN) for 20+ years.

#### Board of Directors

##### Dr. Mark Braugher

Former CEO of Argonex, a biotoools company acquired by Serologicals. Prior VP business development with Pharmacia & Upjohn and later VP clinical and regulatory affairs for Intrexon.

##### Dr. Aris Persidis

Co-Founder & President of Biovista, an AI drug positioning and precision medicine pioneer. Past experience in leadership positions within biotoools companies like Upstate, Serologicals, and Cellzome.

# Our Partners



## THE CITY CLUB OF WASHINGTON

In 1987, The City Club of Washington was founded as a private yet inclusive environment to bring together prominent business and social leaders of Washington, D.C., for influential conversation and shared experiences. Situated within walking distance of the White House, National Monuments and the Pennsylvania Avenue Corridor, the Club is rooted in a strong foundation built on rich tradition.



## 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 services across a wide range of practice areas. 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](http://ShulmanRogers.com).



## 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.



## NEW YORK LIFE

At the heart of New York Life is a commitment to be there for our customers when they need us—whether today or decades into the future. We have delivered on that promise for over 175 years by investing wisely, growing a portfolio of strategic businesses, and remaining true to our mission as a mutual company, accountable only to our customers, not to outside investors. For our customers, that means having the confidence that comes with knowing they can build a better future for themselves and those they love.



## BLU VENTURE INVESTORS

Blu Venture Investors is a venture capital investment company that supports early stage entrepreneurs in the Mid-Atlantic Region – Maryland, Virginia, Washington, DC and North Carolina. We typically invest \$500K to \$1.0M in a single round. When larger financing rounds are needed, we actively look to syndicate deals with other investment groups in our network. Our goal is an accelerated, successful exit, for both company founders and investors alike.



## THE MARYLAND TECH COUNCIL VENTURE MENTORING PROGRAM

The Maryland Tech Council Venture Mentoring Program (MTCVMS) 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.



### **BUZZY ROCKET**

Buzzy Rocket was founded 12 years ago with the mission to help startups grow and scale their businesses. Debbie and Victoria do this with their decades of marketing experience combined with their first hand experience founding, growing and scaling successful startups. They only work with 6 startups at any given time so they can provide 1:1 attention to you and your team. The Buzzy Rocket team is also made up of web developers, graphic designers and copywriters so they can help you easily execute the marketing strategy they create. Learn more about their services at [BuzzyRocket.com](http://BuzzyRocket.com).



### **BYOND**

We guide executives and business owners to build substantial value for their companies and achieve positive business and personal outcomes, making a significant impact within your organization. We have decades of business-to-business experience with technology companies. We are flexible in how we work with clients. We also recognize the impact that our work can have on the lives of company executives and their employees; we carry this awareness with us as we work with our clients.

Our holistic approach avoids many common issues when growing your company's revenues and profits. We bring our proprietary methodologies, tools, experienced advisors, and our novel service model together in an action plan to quickly and sustainably grow your business value, often averaging more than 27% per year.



### **ENTERPRISE TRANSFORMATION SOLUTIONS**

#### **INES LEBOW, FOUNDER AND PRINCIPAL @ilebow1**

Ines LeBow is the Founder and Principal Startup Consultant at Enterprise Transformation Solutions (ETS), which advises entrepreneurs on how to position themselves for funding. Over the course of her 30+ years in the industry, Ines has helped companies secure more than \$800M in funding, led start-ups and turnarounds for companies with up to \$500M in revenue, managed 11 M&A transactions, and guided 9 companies to a successful exit. With expertise spanning Operations, Executive Leadership, and Mentoring, Turnarounds, Revenue implementation, Engineering, as well as Communications, Ines has helped many companies prepare for VC and angel investment.

## **SHOUTOUT TO OUR PREP TEAM**



# October 17, 2023 ATTENDEES

## SPEAKERS

First	Last	Title	Company
Tien	Wong	Founder and Host	CONNECTpreneur
Nishaud	Rajcoomar	General Manager	The City Club of Washington
Anthony	Millin	Founder and Co-Chair	NEXT powered by Shulman Rogers
Mark	Haas	CEO	AEG

## PRESENTERS

First	Last	Title	Company
Rachel	Zayas	Founder & CEO	AGED Diagnostics
Sheldon	Goldstein, MD	CEO	Coagulation Sciences
Ryan	Beswick	CEO	Couple.com
Chuck	Daniels	CEO	D3 Unified Communications
Andrea	Pais	Founder & CEO	Novel Microdevices
Sam	Glickstein	CEO	Osprey BioScience

## ATTENDEES

First	Last	Title	Company
Noah	Abramowitz	CEO	Echelon
Satya	Akula	Managing Partner	New Angel Capital
Roger	Allenbaugh	Managing Partner	Northharbor Holdings
Dave	Anderson	President	Prestructure
Samad	Arouna	Marketing Coordinator	Ryan& Wetmore, PC
Solomon	Asad	Venture Partner	Forward Deployed VC
Darrin	Auito	Partner	HEA Law
Larry	Austin	President	Starwalker
Mark	Baldino	CEO	FireBot Suppression
Alexander	Barrett	CEO	ifinca
Laura	Beldin	Senior VP	Bank of America
Vippy	Bhambra	Principal	Company Glom LLC
Mahesh	Bhatija	CEO	Human Health Ventures
Urvashi	Bhatnagar		
Charles	Birney	President	Podville Media
Jeff	Brouse	Membership Sales Director	AEG
John	Brown	Founder	Poncho
Peter	Buchanan	Managing Partner	NewPlan, LLC
Doug	Carney	Private Investor	
Julia	Catuara	Financial Services Professional	New York Life
Debbie	Cline	Founder & Chief of Customer Success	Buzzy Rocket
Ed	Connors	CEO	Heudia Health
Susan	Coots	Financial Services Professional	New York Life
Amy	Cousins	Financial Services Professional	New York Life
Linda	Daniels	COO	D3 Unified Communications
Hank	Dearden	Executive Director	ForestPlanet, Inc.
Hector	Del Castillo	CPO	Byond
Brian	DeMuth	Partner	Riphean Investments
Sam	Diener	Managing Partner	Early Light Capital
Juli	Dillon	VP, Engineering	Coagulation Sciences
Rich	DiPippo	Partner	NFP
Sarah	Djamshidi	President & Managing Partner	Speedshift Advisors
Randy	Domolky	Managing Partner	Private Access Network
Lisa	Dorsey	Principal	Terra Nova Capital
Edward	Ducoin	Founder	Orpical Group
Amy	Dunn	Director, Business Development	Ryan& Wetmore, PC
James	Early	Managing Partner	Tamarack Advisory
Elizabeth	Elson	Vice President of Development and Production	Podville Media
Pete	Erickson	CEO	MODEV
Peter	Ettinger	Sr. Advisor	Bioenergy Devco
Herb	Ezrin	President	Potomac Business Group
Ken	Fealing	Director of Government Affairs & Innovation	StormCenter Communications
Angie	Fox	CEO	Foxgloves
Peter	Frantz	Sr. VP, Business Operations	Amarex Clinical Research, LLC
Lisa	Friedlander	CRO	NEXT
Chris	Galloway	Advisor	Tigress Financial
Sandra	Garrett	CEO	MediMergent
Rick	Gilchrist	CEO	Vannadium
Lee	Golden, MD	Chairman	Coagulation Sciences
Doug	Goldstein	Managing Director	Salt Flats
Don	Goodwin	CEO	2BAgile

Jace	Greenman	Founding Partner	Salesium
Glen	Gulyas	CEO	Ap Cyber
Patrick	Gulyas	Marketing Director	AP Cyber
Fred	Gumbinner	CEO	MTI
Neal	Gupta	Chief Investment Officer & Co-Founder	KiwiTech
Ralph	Heacock	CEO	DeepTerrain Inc.
Pat	Healey	CEO	Ernie.com
Hormoz	Hekmat		
Deborah	Hemingway	Investor	Ecphora Capital
Rebecca	Howick	Dir. of Ops. and Engagement	GMU School of Business
Miriam	Huber	Innovation Activation Specialist	Johnson & Johnson Innovation - JLABS @ Washington, DC
Phil	Jung	Partner	Sovereign's Capital
Marcel	Kaminstein	Sr. Mgr International	BIO
Jim	Keeney	CEO	Dapt
Joe	Kessler	Managing Partner	Next Stage Development
Sotti	Koev	Co-Founder	Koev Brothers
Marty	Koev	Co-Founder	Koev Brothers
Tom	Kohn	Professor	American University
Vijay	Lakshman	Managing Partner	Mindgrub Ventures
Ines	LeBow	CEO	Enterprise Transformation Solutions
Xiaonao	Liu	CEO	NanoBioFAB
Brad	Love	President	Kang Capital
Jet	Lu	Customer Solutions	Amazon Web Services
Bei	Ma	Founder & CEO	The Pinea Group, LLC
Cris	Madureira	Expansion Director	FCJ Venture Builder
Janice	Mandel	Advisor	Open Voice Network
Karen	Maschi	Founder   CEO	Veza Innovations
TJ	Master	Technology Mentor	ICAP
Peyton	McGrath	Event Assistant	CONNECTpreneur
Greg	Merril	CEO	Adaptive Phage Therapeutics
Patricia	Morehouse	Founder / CEO	Beauty.ls
John	Morgan	Principal	Morgan.Global
Roy	Morris	Investor	STI
Lou	Morsberger	Principal	LJM Associates
Silvana	Nani	Chief Innovation Officer	Korabi Consulting
Victor	Nazario	COO	SOAR Community Network
Michael	Nelson	CEO	Intrimmune Therapeutics
Michelle	Nguyen	Chief Partner	Timely Partner
Mike	Niggel	CEO	ACT1
Alex	Nunes	Managing Partner	Skaloup
Paul	Opalack	Managing Director	Noblestar Endeavour
Mali	Phonpadith	CEO	SOAR Community Network
Cynthia	Porter	Sr. Account Manager	Lumious
Ali	Qureshi	COO	NuAxis
Mayisha	Rahman	Biotechnology Innovation Associate	AGED Diagnostics
Morgan	Rath	Membership Operations Manager	AEG
Rachel	Rath	BARDA Alliance Director leading BLUE KNIGHT	Johnson & Johnson Innovation
Victor	Rhoder	VP of Channels and Strategic Partnerships	AtWork Systems LLC
Chuck	Richards	CEO	CoreValue
David	Richards	COO	ValuCompass
Danny	Ryan	Managing Partner	Alikos Wealth
Rosemarie	Savino	COO	AEG
Devin	Schain	CEO	Student Playbook
Pete	Schramm	CEO, Author, Growth	Lattitude & Statra
Cindy	Shao	CEO	Asian American Chamber of Commerce
Auran	Shereef	Founder	Konnex
Dustin	Siggins	CEO	Proven Media Solutions
Amit	Singh	CEO	NearStar Fusion
Martha	Sklavos	Founder & CEO	Aloe Therapeutics, Inc
Mike	Smith	CEO	MSBD
Anthony	Solazzo	Managing Partner	Masonboro Partners
George	Spears	CEO	Atero
Chris	Steele	R&D Strategist	USN Bureau of Medicine & Surgery
Jacob	Stiglitz	CMO	ifinca
Tom	Swanson	Corporate Development	Personam.ai
Calvin	Sze	Event Assistant	CONNECTpreneur
Jennifer	Taylor	CEO	NVTC
Ben	Teicher		
Ben	Teicher	Principal / Founder	Fairlane Partners
George	Thomas	Chief Innovation Officer	Connected DMV
Dean	van Zyl	Founder/CEO	National Adhesive
Beth	VanStory	President	Thinkout
Jun	Wang	CEO	Phycin
Michele	Weatherly	Entrepreneurship Director	PWC Economic Development
Michael	Webb, MA, MBA	Member, Advisory Board	Coagulation Sciences
Barry	Weinbaum	Financial Services Professional	New York Life
Amelia	Whitney	Event Assistant	CONNECTpreneur

Laurie  
Mike  
Darren  
Steve  
John  
Oscar  
Shannon

Wiggins  
Wolk  
Womer  
Yannaras  
Yetman  
Zeballos  
Zeballos

CEO  
Consulting Partner  
President & CEO  
Medical Advisor  
Co-Founder  
CEO  
COO

Beyond  
Expense Reduction Analysts  
National Capital Companies  
Novel Microdevices  
AEG  
Podville Media  
Podville Media

# Thank you to our Partners



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## CUSTOM PRIVATE INVESTOR MEETING

### Overview

- Opus8 manages one of the world's largest investor communities with 4,000+ HNW/UHNW private investors, angels, family offices, investment groups, and small institutional investors.
- We have become a reliable curator and source of high-quality investment opportunities for this community.
- The Client is the exclusive host of these private investor meetings. No other competing or external entities in the meeting.
- Opus8 will screen a minimum of 20+ pre-qualified attendees for the event. The general attendee mix is 75% investors and 25% COIs (Centers of Influence).
- Attendee/RSVP lists with contact information and LinkedIn profiles and other data will be provided to the Client before and after the event.

**Check out the full brochure with all information here:**



### Our 9-Step Process

1. Review investment materials and determine key investment considerations.
2. Develop a list of potential investors.
3. Create a "teaser invitation" and send it to investor candidates along with an executive summary
4. Confirm and vet RSVPs
5. Answer any questions or info requests pre-event.
6. Triple confirm all RSVPs via email and calendar invitations.
7. Host the private investor event and follow-up with attendees.
8. Introduce any RSVPs who did not attend to management.
9. Assist in following up with any and all investor prospects post-event.