

# STRATEGIC ALLIANCE PARTNERS



Remember SAPS for presentations to your employees & clients too!



**Adams Keegan**  
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## FORUM TOPICS

- Assessing cost and finding leaks in HR operations: How much should HR really cost?
- The laws of benefits: What you can and cannot do regarding employee benefits.
- All things PPP and Covid: Navigating your business and employees through this difficult time.



**Baker Donelson**  
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**Chris Sloan**  
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## FORUM TOPICS

- Top 3 issues employers should know about for operating during Covid-19.
- Make your workplace a hard target: Practical strategies to prevent and prepare for violence in the workplace
- Choose your own adventure: If another question or topic is of interest to your forum, we will customize a presentation just for you! Or we could bring a couple of folks for an "AMA" (Ask Me Anything) session.



**Bradford Dalton Group**  
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**Jeff Bradford**  
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(615) 252-2354

## FORUM TOPICS

- Content Marketing 101.
- SEO: How to show up on more web searches.
- How to celebrate your company's anniversary.



Bradley Arant Boult Cummings LLP

**Bradley**  
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**Doug Franck**  
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**Russ Morgan**  
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## FORUM TOPICS

- Q & A from a legal perspective - engaging, compensating and transitioning employees.
- Due your diligence now and lessons to minimize surprise - milestone transactions & key company contracts.
- Our success depends on our IP - helpful hints to protect and monetize this, that and the other.



**The CityLiving Group at Village**  
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**Deborah Vahle**  
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## FORUM TOPICS

- Buying and selling your home during covid
- Nashville real estate market update
- Ask Mark! Have real estate questions for Mark Deutschmann?



**CLA (CliftonLarsonAllen)**  
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**Mark Wyzgowski**  
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## FORUM TOPICS

- Questions you should be asking your CPA-What all taxpayers should know/Own the plan to execute
- How to become bankable- Numbers matter, but what else can help?
- How do you know when you are ready to sell your business? Financial/Emotional
- Trends in financing start-ups



**Compass EAST**  
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**John Lanahan**  
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## FORUM TOPICS

- Scalable financial operations: Technology stacks.
- Building financial infrastructure for KPI development.
- Cash forecasting 101.



**Continuum Planning Partners**  
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**Andy Faught**  
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## FORUM TOPICS

- How to make your assets dynamic.
- Creditor and asset protection: Protect what you have worked so hard to build.
- Economic outlook: Prepare for changes in the local and national business environment.



**Dev Digital**  
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**David Ross**  
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## FORUM TOPICS

- There is Blood in the Streets... NOW WHAT? Now is the best time to invest in your business.
- SEO is the CEO of your Website- A discussion on how Search Engines can drive more qualified leads straight to your website.
- "THERE SHOULD BE AN APP FOR THAT!": How to tell if investing in app development is the right way to spend your money.



**First Horizon Bank**  
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**David Jones**  
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**FORUM TOPICS**

- Economic update/forecast.
- Leveraging technology to run your business more efficiently and profitability.
- Beyond PPP: What role the SBA can play in your business.



**Frazier Deeter**  
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**FORUM TOPICS**

- Personal and business tax planning to maximize cash-flow
- R&D credits and the benefits to small and mid-size businesses
- Statement of Control (SOC) reports and internal control assessments to support your control environment



**m2 consulting**  
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**Mary Sobon**  
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**FORUM TOPICS**

- Creating change in uncertainty.
- The psychology of an entrepreneur and how to align your team to it.
- Leader evolution – developing leaders now for what is next.



**Martin & Zerfoss**  
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**Paul Steele**  
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**FORUM TOPICS**

- Insurance and Covid: What's covered?
- Risk Management: Planning for a Disaster.
- Testing Your Systems: IQRMs. IQRMs are tests we can administer created by industry experts in fields like cyber, fleet safety, business continuity, etc. A company can take a test to see what grade they get in a certain area.



**Nashville Entrepreneur Center**  
www.ec.co  
**Jane Allen**  
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**FORUM TOPICS**

- Building a diverse and inclusive culture: Companies that focus on building diverse and inclusive teams have a significant competitive edge when it comes to financial performance, innovation and capturing new markets
- How does the EC drive impact and value throughout the entrepreneurial lifecycle.
- How is Nashville connecting the entrepreneurial, business and investment communities to drive entrepreneurial growth



**orangethreadLIVE**  
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**FORUM TOPICS**

- The Guide to a Great Virtual Event
- Automating Marketing – Drip Campaigns & Scheduled Social
- Becoming More Creative: More Muscle than Magic



**Pinnacle**  
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**FORUM TOPICS**

- Show me the money - how to get a loan from a bank.
- Beg, borrow or buy - financing options to acquire (or be acquired).
- How SBA can help your business.



**Tennessee Valley Group**  
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**FORUM TOPICS**

- Selling your business in a post-COVID environment.
- How to prepare to sell your business in five years.
- Maximizing valuation trends.



**Vaco**  
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**FORUM TOPICS**

- Embracing company culture in the new virtual world.
- Hiring, on-boarding, and retaining your team in a remote world.
- How to foster existing relationships in a virtual world.



**Virsys12**  
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**FORUM TOPICS**

- Why do you need a CRM.
- A CRM system is not just for sales anymore.
- How to eliminate silos and increase collaboration within your organization.



**Waddell & Associates**  
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**FORUM TOPICS**

- Update from David Waddell on current economic, market, and political conditions.
- A team approach to your estate plan: The decisions, the documents, the doing.
- What would Mary Poppins say: Is your personal financial house shipshape?



**WC Dillon Company & Insight Risk Management**  
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**FORUM TOPICS**

- What to expect when your business is sued or has property damage - Current claims scenarios affecting our customers and what coverage gaps put businesses most at risk.
- Covid insurance updates - active and potential lawsuits against businesses and insurance companies, what is covered by insurance and what are exposures to my business.
- Why is health insurance so expensive? An insider's opinion.