



VA COUNCIL OF CEOS  
*follow the leaders*

## SPONSOR TOPICS 2019

Version 2019a- Feb 2019



VA COUNCIL OF CEOS  
*follow the leaders*

The Council enjoys the financial support of a number of businesses that are a rich resource for our members. They come not with a sales pitch, but with the goal of sharing knowledge and experience.

We encourage Roundtables and Forums to invite sponsors to present to them. Some Sponsors have facilities at which they would like to host your meeting, including catering. Others may not, and would prefer just to come to your regular meeting place. If you would like to meet a particular sponsor, or have interest in a particular expertise that might be met by one of them, please contact them directly to discuss your interests and arrange the details of the visit.

When you report monthly Roundtable attendance, please also report on any sponsor visit, and give us a rough 1 to 10 (10 is excellent) rating of their presentation.

Need help? Call or email us: 804-360-2644, [info@vaceos.org](mailto:info@vaceos.org)

## Table of Contents

Robins School of Business, University of Richmond	4
Fahrenheit Advisors	5
Virginia Commonwealth Bank	6
Warren Whitney	6
PartnerMD	8
Transact Capital Partners	9
Virginia Asset Management	9
Adams, Jenkins & Cheatham	10
Jones Lang LaSalle	11
Keiter	11
Marriott & Co.	12
Spotts Fain	13
The Change Decision	13
Union Bank	14
Avenue 8 Advisors	14
Catch Your Limit	15
Cornerstone Valuation	16
Dixon Hughes Goodman	16
Eckert Seamans	17
Endeavor Capital	18
Henrico EDA	19
Insperty	19
Segra Communications	20
South State Bank	20
College Company	21
Curtis & Company	21
TachLock	22

## Robins School of Business

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### **Executive Education at the Robins School of Business**

Developed in partnership with VACEOs members, **CEO Essentials** is an eight-week program covering the most requested topics by Council members. Each four-hour session is specifically designed for the CEO of a small or mid-sized business and immerses participants in topics such as organizing your business for growth, succession planning, data analytics, and leading effectively through change. Classes are facilitated by Robins School of Business faculty and well-qualified adjunct instructors. The learning is enhanced by the experience of the executives in the room as participants engage with each other to address the most pressing challenges of running a business. This program is a unique way to support **succession planning** in your organization as we invite you to bring another senior leader to learn alongside you.

We also offer professional development classes addressing **general business acumen, leadership, influence, strategic account management, negotiations, communications, presentation skills, navigating conflict, and enhanced teamwork**. Anyone in your organization can attend our open enrollment classes, or we can tailor it for you and customize any of our courses for your organization's specific needs.

VACEOs member organizations receive a discount on Executive Education classes and programs. Our faculty are also available for strategic consulting projects and facilitation. Examples of projects where we can assist you include:

- Defining and clarifying company values or culture
- Creating or updating your strategic plan
- Performing operational needs analyses
- Developing talent management strategies
- Improving customer relationships

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### **The Richmond MBA at the Robins School of Business**

MBA Capstone projects are pro-bono, strategic consulting projects conducted by MBA students nearing completion of the program and supervised by a faculty advisor. Do you have an important strategic challenge, but lack the resources to address it? More than 500 organizations worldwide—from corporate headquarters, to local franchises and entrepreneurial ventures—have benefitted from a Richmond MBA Capstone project. Sample projects include helping organizations develop strategies to increase revenues, enter new markets, launch new products and acquire or sell businesses. We have completed Capstone projects with numerous VACEOs companies. Yours could be next.

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## Fahrenheit Advisors

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### Business Performance

- Managing and forecasting cash and working capital.
- Measuring the true profitability and viability of your business – it's more than an income statement.
- Turning data into information to make decisions and run your business.
- Implementing practical processes and controls to make your business more efficient and profitable.
- Aligning your business processes with the systems that run your business. Getting the most from your systems and training employees to be the most productive.

### Sales Organizations

- Installing accountability in a sales team.
- Capitalizing on revenue growth initiatives.
- Implementing sales team compensation strategies.
- Transforming sales force productivity via best practice implementation.
- Developing a winning go-to-market strategy.
- Optimizing pricing and margin contribution.

### Growth Strategy

- Creating growth through strategy development and execution.
- Expanding your business, with acquisitions, alliances and outsourcing.
- Managing through periods of disruption.

### Capital Strategies & Exit Strategies

- Understanding what M&A advisors do, and what's the difference between business brokers and investment bankers.
- Understanding the process of selling my business or raising capital, and how long does it take.
- Selling your business and raising capital - the financial keys to success.
  - When is the right time?
  - What are my exit alternatives?
  - How much is my business worth?
  - What drives premium valuations? What are buyers looking for, and what can I do now to check more of their boxes?

### Talent

- Identifying the right time and best approach to upgrade your management team or finance function and getting the most from your investment.
  - Do you have the right team on the bus and in the right seat?
  - Do you have a financial advocate?
  - Do you have a bookkeeper, controller or CFO? What is the difference?
  - Do you need fractional or full time? Can you get results with a defined project or mentoring?
- Recruiting great talent in a tight labor market, developing a talent pipeline and retaining key talent.

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## Virginia Commonwealth Bank

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In the community banking world, success is based on people! That is certainly the case at Virginia Commonwealth Bank where we know that with our experienced and engaged teammates, we promote a positive culture, attracting valuable customers, who will ultimately have great success. The more value our bank provides, the more our community and clients will benefit. We have committed to building on VCB's 80-year history serving Central Virginia and the Northern Neck as a true community bank headquartered in Richmond with experienced, locally-established bankers and state-of-the art products delivered with a true community bank spirit and approach. All decisions are made by our local bankers and management team to deliver banking with local knowledge and a sense of urgency. It's truly "Uncommon Banking" from Virginia Commonwealth Bank!

**Contact:** Matt Paciocco, 804-510-0213, [matt.paciocco@vcb.bank](mailto:matt.paciocco@vcb.bank)

## Warren Whitney

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### Scott Warren:

- The Essentials of Cash Flow Planning
- Succession Planning: Your Company's Future
- Are you getting what you need from your accounting system?
- Financial Projections – Don't forget the balance sheet!
- Enterprise Risk Management: What should be keeping you awake at night!
- Managing Your Company's Working Capital
- Financial Management for Growing Companies
- Financial Management for Non-Profits
- Data Decision Making: Perspectives from both CFO and CIO

### Katherine Whitney:

- Executive Search: "Buying" and "Selling" at the Same Time
- Strategic Planning for Non-Profits
- Smooth Transitions to New Board Chairs
- Mergers of Nonprofits: Considerations, Decisions, and Implementation
- Cultivating and Engaging Board Members
- Setting the Right Expectations: Board Member Responsibilities

### David Nelms:

- Aligning business goals & tech strategy: Key considerations for developing a plan
- Technology: Tips on managing resources, controlling costs, & improving performance
- Selecting new software: How to maximize results and minimize downside
- Change Management: Considerations before investing in a systems upgrade
- Business processes and technology - Which is the chicken and which is the egg?

### Beth Williams

- Harassment Awareness for Managers and Employees

- Employee Retention: Cost efficient ways to motivate your team
- Defining and living your Culture
- When to call an HR Resource
- New Managers and Supervisor training workshops (series)
- Conducting an HR Audit
- HR Basics for Small Business
- Recruiting Challenges Today
- How to Select an HRIS system

**Janet Duncan**

- The Total Rewards System: Compensation Trends to Watch
- Organizational Dynamics
- Change Management

**Kevin Grey**

- Constructive Criticism: How to Turn Negative Feedback into a Positive
- Effective Mentoring and Coaching to Empower Employees
- Tactics to Handle Difficult People in the Workplace
- Building Company Culture – A How to Guide
- Organization Change Management: How to Effectively Transition
- Developing Leadership Competency in your Organization

**Gene Gregory:**

- Budgeting 101: Budgeting for the non-Accountant
- Statement of Cash Flows: Your Key Monthly Financial Management Regimen
- Benchmarking Your Business: Effective use of Dashboards
- Preparing your Business for Sale
- Understanding the Balance Sheet for Non Accountants

**Greg Herceg:**

- Lessons Learned from the Trenches: Experience from the CEO Corner

**Cyndy Lowery:**

- Internal controls...Beyond Talking the Talk...Walking the Walk
- Introductory concepts in Forensic Accounting

**Jill Swinger:**

- Efficient Audit Preparation
- Teaching your Key Managers how to Understand Internal Financials
- Maximizing Quickbooks as a Reporting Tool

**Contact:** Stephanie Ford, 804-282-9566, [sford@warrenwhitney.com](mailto:sford@warrenwhitney.com)

**PartnerMD**

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PartnerMD is the leading concierge primary care and executive health provider in Richmond. Our physicians, health coaches and consultants speak on topics that improve the health of you, your employees and your business. For your business, learn how owners leverage executive health benefits to

improve their own productivity and retention of their most valued employees. For better health, we can even help you better manage your stress and improve your sleep.

### **Executive Health**

Understanding Concierge Medicine: Is it Right for You? Your Company?

The Evolution of Health Care: Is your annual physical keeping up?

How Small Business Owners Leverage Concierge Medicine

What is an Executive Physical and do you need one?

The Top 10 Numbers You Need to Know

### **Employee Benefits**

Top 2019 Trends in Employee Health Benefits

How Concierge Care Improves Retention and Health of Your Top People

Why Corporate Wellness Programs Fail

Creating a Culture of Health at Your Workplace

### **Stress and Sleep**

Manage Your Stress in 15 Minutes

Insomnia: It's More than Just a Blue Light Problem

Better Balance: A Story of Work and Life

### **Meditation and Mindfulness**

Positive Thinking: Happiness Engineered

Mindfulness: A Simple Guide to Better Living

### **Nutrition**

Foods that Cause Inflammation in the Body

The Psychology of Food Choices

Sugar Swaps: Eat This, Not That

Weight Loss: This Time it's for Real .... Or Not

### **Fitness**

Fitness Pitfalls: Make Your Workouts Actually Work

Couples Counseling: You and Fitness

### **General Wellness**

Myths and Misconceptions about Women's Health

The Fountain of Youth: Maximizing Your Wellness

The Mysterious World of Habits Explained

Staycation of Health: Creating Your Own Blue Zone

The Motivation Trap: Fix Your Approach in 30 Minutes

Looking for something specific that you don't see? Just ask and we probably have a physician or health coach who can speak to it. To learn more and book a speaker, please contact either one of us below.

Thank you!

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Janet Kiss, Membership Development, 804-420-1212, [jkiss@partnermd.com](mailto:jkiss@partnermd.com)

## Transact Capital

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### Exit Strategy

- What is my company worth today and how can I maximize its value?
- What should I be doing now to sell?
- I cannot afford to sell; I cannot afford not to- solution?
- What does the sale process look like and what to expect?
- Completing a successful transaction- be careful who you partner with!

### For CEO Forums:

- The Perfect Five-Year Exit Strategy for Large Companies
- Strategic Growth Acquisitions
- The process of identifying and completing the perfect acquisition
- What to expect post-acquisition

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## Virginia Asset Management

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### Be Your Own Berkshire – The Private Business Owner’s Reinvestment Decision

- Number 1 job of a CEO is Capital Allocation – think like an investor when evaluating your full option set with owner earnings.
- Begin with the end (exit) in mind – regardless of your timeframe. An owner’s unique objectives will lead to very different uses of surplus cash.
- Understanding the value of your business to a third party is important information – understanding the value of your business to you and your family is critical information. Know the difference.
- Your level of ‘Financial Readiness’ & ‘Mental Readiness’ will dictate the liquidity options available to you – owner level planning will evaluate both throughout your business lifecycle.
- Anticipate trouble – ‘inversion’ is a highly effective way to frame and prioritize decisions. Understanding where many private businesses get in to trouble will help guide allocation decisions.

- A decision ‘waterfall’ with owner earnings will help you allocate your cash to highest and best use throughout your ‘machine.’

#### Your 401K/Profit Sharing Plan is a Significant Investment in your Workforce & Culture – Maximize It

- Understand the Fiduciary Roles & Responsibilities for all Officers and Service Providers
- Excessive Fees, Lack of Transparency, & Conflicts of Interest connected to Investment Selection are where the trouble spots lie. Understand best practices in retirement plan design.
- Understand how the Profit-Sharing sleeve of the retirement plan can be utilized to reward and retain your key people – often overlooked as a tool.
- Be aware of Cash Balance Plans’ utility in select situations.
- Financial Wellness for your Workforce – a well communicated retirement plan will reduce financial anxiety and raise the productivity of your people.

**Contact:** Tripp Leonard, Principal, CFP®, AIF®, 804-327-0431, [tripp.leonard@vamllc.com](mailto:tripp.leonard@vamllc.com)

## Adams, Jenkins & Cheatham

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At Adams, Jenkins and Cheatham, our CPAs and consultants are “*simplifying the road to success*” for our clients. We do this by seeking to build long-term relationships with the people and companies we serve enabling us to offer them financial solutions, value-added expertise and innovative opportunities. Our desire is to go beyond the ordinary audit and tax services by making it our mission for clients to recognize their current and future business goals. Let us join you on your business’ road to success!

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## Jones Lang LaSalle

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#### **Tenant Representation for Leasing Space**

- Lease Renegotiation Specialist- How to take advantage of the market for maximum rental savings from your present landlord.
- Relocation Strategies- How to attain Class A space for Class B prices

- The Relocation Process- opportunities and challenges

#### **Buyer Representation**

- How to acquire owner occupant buildings
- How to create leverage in negotiations

#### **Leasing/Disposition Services for Owned or Leased Property**

- How to lease your space or sell your building at the highest value
- Broker Opinion of Value- What is y building worth?
- Subleasing Strategies- How to effectively sublease surplus space

#### **Market Research & Intel**

- Office market reports
- Industrial market reports
- Market relevant lease and sales comparables

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Scott Harrison, 804-200-6435, [Scott.Harrison@am.jll.com](mailto:Scott.Harrison@am.jll.com)

## **Keiter**

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#### **Cybersecurity & Technology**

- Cryptocurrency: Understanding Business Usage
- Cybersecurity for Small – and Mid-Sized Businesses
- Cybersecurity Assessment Training

#### **M&A Transactions and Exit Planning**

- Exit Planning: A 3-5 Year Planning Approach
- Planning for a Successful Merger or Acquisition
- Making charitable giving part of your exit plan

#### **Business Valuation**

- Estate, Gift, and Income Taxes
- Buy-Sell Agreements
- Mergers and Acquisitions
- Stock-Based Compensation
- Financial Reporting

#### **Internal Controls and Fraud Risks**

- Fraud Risks
- Understanding and Identifying Fraud Risks in a Privately-Held Company
- Internal Controls for Small Businesses

#### **Tax Planning**

- Understanding Opportunity Zone Funds and Investments
- 2019 Taxes – What new planning options should be considered
- Understanding how the TCJA impacts your tax return (including QBI)
- Tax Planning for the Privately-held Business

- Year-end Tax Planning Strategies (Individual and Business Perspectives)
- State and Local Taxes – Keeping up with the Changes
- Applying the Wayfair case to your state and local tax situation

#### **Employee Benefit Plans**

- Fiduciary Responsibilities for Employee Benefit Plans

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(Fonda can help you find the right expert at Keiter)

## **Marriott & Co.**

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Headquartered in Richmond, Virginia, Marriott & Co. is a premier, independent boutique investment banking firm focused on advising closely held private companies across a wide variety of industries. The firm provides merger and acquisition advisory and capital raising services primarily to family-held businesses and entrepreneurial business owners in the middle market. Marriott & Co.'s unique entrepreneurial culture enables the firm to tailor its services to meet the needs of its clients, and the firm's professionals have an unparalleled understanding of the challenges and opportunities facing these companies and their owners today. By delivering senior banker attention, a high-touch approach to client service and best-in-class process execution to every assignment it undertakes, Marriott & Co. has established a long track record of closing successful transactions for clients through Virginia and all over the U.S.

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## **Spotts Fain**

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Businesses throughout Virginia and beyond have turned to Spotts Fain for legal representation and advice since 1988.

From trials to transactions, business law to bankruptcy, intellectual property to employment law, we offer a broad range of legal and consulting services to local, regional and national businesses. Spotts Fain, Lawyers with Your Business in Mind®.

## Succession Planning and Exit Strategies

**Contact:** Tom O'Brien, 804-697-2070, [tobrien@spottsfain.com](mailto:tobrien@spottsfain.com)

## The Change Decision

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We bring joy to work! At *The Change Decision*, we live in-between the space of temporary change and lasting outcomes. This is where joy is often lost. We believe this is where you can create it. Our purpose is helping organizations strategically lead their teams during transformational shifts. We know (because we've seen it happen) that with the right process and engagement, you and your employees will not only achieve your goals- you'll create a culture shift that truly engages your team in ways you never imagined.

Our expertise includes complex decision-making, strategic visioning/planning/implementation, organizational change management and team engagement. Our approach is creative, unexpected and specifically suited to each leader and their people.

### Presentation Topics:

- Team engagement
- Leading change (e.g., company growth, internal transitions, mergers and acquisitions, strategic initiatives)
- Using business analytics to drive the change you need
- Personal resilience and adaptation
- Group decision-making
- Creativity at work
- Finding meaning at work
- Stakeholder management and communication
- Navigating team dynamics
- Leader-Team feedback
- Virtual team building
- Creating a culture of recognition and appreciation
- Building trust internally

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## Union Bank

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At Union, we believe people have a right to expect more from the companies they do business with – and they can expect more from Union Bank & Trust, a bank whose Virginia roots go back to 1902.

By offering fair financial solutions and honest advice, we create opportunities for families and business

owners. And in doing so, we fulfill our purpose of enriching the lives of the people and the communities we serve. Our relentless focus on our customers and 100% local decision-making means that no matter how much we grow, we'll always be a community bank.

- Things to consider when evaluating buying your own building
- Treasury Services: How to make your money work harder for you while streamlining your back-office function.
- What is a Working Capital Line of Credit, and is it the right solution for your company?
- Where are interest rates, and where are they heading?
- The importance of cash flow management to a growing business.
- An open dialogue about banking, rates, business owner trends, economic movement.

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## Avenue 8 Advisors

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Avenue 8 is a woman-owned leadership development and strategic operations practice. Danessa Knaupp, founder and CEO, brings compassion, candor, and pragmatism to leaders and their teams. Danessa is available to present on the topics below. Don't see what you need? Danessa is happy to customize a conversation specific to your roundtable's needs.

### Leadership Development

- Shifting your leadership perspective (because what you don't see is costing you money)
- Balancing competing priorities
- Taking your leadership game to the next level
- Managing the multiple changes of rapid growth
- Defining your strategic path and purpose
- Conducting difficult conversations with compassion and candor
- Finding your mojo
- Exploring your leadership preference
- The power of a pause practice (why all leaders should be moving, meditating, and reflecting)
- The ROI of executive coaching: when you should invest in a coach and when you're wasting your money

### Team Management

- Recognizing and rewarding employees
- Defining and executing a performance management plan
- Setting clear expectations

- Mastering team communications
- Super-charging performance
- Motivating teams
- Giving and receiving feedback
- The change cycle and how to master the curve

### **Strategic Operations**

- How to define and measure team performance
- How to get from here to there: a practical guide to building a strategic plan
- Breathing life into your strategic plan
- Connecting your strategy to your purpose
- The messy middle of change: what really matters?
- What's really missing: conducting a gap analysis

**Contact:** Danessa Knaupp, 804-381-8638, [danessa@ave8advisors.com](mailto:danessa@ave8advisors.com)

## **Catch Your Limit**

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For over 16 years, our “guides” have worked with CEOs, from start-ups to Fortune 500 companies, to build collaborative cultures, assess leadership needs, develop high functioning team, custom design/ implement leadership development systems, and facilitate strategic retreats and team meetings. We also speak and write on a variety of leadership topics and teach at VCU’s da Vinci Center for Innovation.

Since becoming a VACEOs sponsor in 2015, we have been asked to host/kickoff roundtable meetings, we’ve spoken at the Annual CEO Retreat and at a Knowledge Network lunch. Below is a sample of our most in demand topics. Choose from these or reach out and let us know what your needs are... we may be able to deliver for you or connect you to a resource that would best meet your needs.

### **Leading the Leadership Team**

Every person on your leadership team needs to model the attitudes and behaviors that you are expecting of others in your organization, be cohesive in their leadership approach and be held accountable by each other and by you. In this interactive session, assess your leadership team and fine-tune your leadership approach for guiding and growing this level of leaders within your organization.

### **The Company Your Keep- Keys to Attracting, Growing & Retaining Talent**

In the past, businesses asked employees to conform to the organization’s needs. Today’s leaders must attract the right colleagues, keep them, and inspire them to be engaged and to deliver. Focus on your role, the expectations you have of other leaders within the organization, strategies for continuous improvement and ways that these issues impact your bottom line.

### **Leading Sustainable Leadership – Your Key Players Need You**

Think of your high performers. At some point, you’ve recognized their potential, nurtured their growth and given them more autonomy. But, don’t mistake their ambition and success as signals to stop being involved... our leadership journeys are constantly evolving and the need for a trusted guide is needed now

more than ever. Explore ways to help you and your top performers prevent, recover from and avoid relapsing into burnout and strategies for retention.

### **Courageous Conflict**

Avoiding disagreements, holding back, choosing battles and not fully engaging lead to wasted time, lack of commitment, poor decision making and resentment among team members. Become a catalyst for courageous conflict and encourage others to follow your lead.

### **Think Smart. Think Fast.**

Learn a new approach for ideation, gaining buy-in and making decisions in a short amount of time. Eliminate unproductive meetings, quit arguing, increase creativity, save time, have fun and get results.

**Contact:** Melissa Laughon, 804-767-1702, [melissa@catchyourlimit.com](mailto:melissa@catchyourlimit.com)

## **Cornerstone Valuations**

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- Business valuation
- Estate planning
- Strategic corporate financial management
- Buying/selling businesses (Mergers & Acquisitions)
- Establishing values for partner buy-ins and buy-outs

**Contact:** Greg Waller, 804-787-3611, [hgwaller@cornerstone-valuation.com](mailto:hgwaller@cornerstone-valuation.com)

## **Dixon Hughes Goodman**

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### **Strategic Planning/Growth**

- Life Insurance Strategies – Supplement traditional retirement planning vehicles with life insurance strategies
- Opportunity Zones – Strategies to combine investment and tax deferral
- Information Technology - Emerging Trends in Cybersecurity
- Financial Management - Internal Control Over Financial Reporting
- Transaction Advisory - Transition and Succession Planning

### **Tax Planning**

- Tax Reform – Where are we a year later? Updates to consider as you finalize your return.
- Virginia Credits and Incentives – State-provided incentives that result in additional return on investment
- Negotiated Incentives – Thinking of a relocating or planning a large capital investment? Consider negotiated incentive strategies to help finance project costs

- The Wayfair Case – How e-commerce and this landmark case affects business owners’ sales and use tax obligations?

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## Eckert Seamans

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### IMPORTANT HR ISSUES FOR 2019 – LEARNING OPPORTUNITIES

**WAGE AND HOUR.** Small mistakes in failing to pay overtime add up quickly, especially when you roll in the potential for paying damages (double the amount due) and attorneys’ fees (yours and theirs if the employee wins). New guidelines are expected in 2019 and they are expected to raise the salary basis requirement from \$23,660 to the mid \$30,000’s. Making sure you have correctly categorized your employees as non-exempt or exempt is key. Learn how to avoid making costly mistakes.

**NON-HARASSMENT.** Harassment claims continue to be emphasized at the Equal Employment Opportunity Commission (EEOC). Last year the EEOC filed 41 sex harassment lawsuits. Collaborative responsibility training is the new norm. Learn how to update your training in response to the #metoo movement.

**INDEPENDENT CONTRACTOR.** The Commonwealth of Virginia continues to focus on converting contractor relationships to employee relationships in order to capture increased tax revenue. Learn how to review all 1099 relationships to make sure the documentation is sufficient as well as the proper analysis to apply. Independent contractors continue to sue employers under a misclassification theory for overtime wages and benefits.

**MARIJUANA.** Marijuana remains illegal under federal law, but several states allow personal use and other states allow medical use only, while others continue to ban all use consistent with federal guidelines. Virginia will soon be allowing medical use based on Virginia production facilities. Learn the rules on whether you can fire an employee for testing positive.

**WEB ACCESSIBILITY.** Employers are experiencing a rise in demand letters. If you do business over the internet, and a person with a disability cannot: (i) Navigate your website in a meaningful way to purchase goods and services;(ii) Figure out the accessibility features of your rooms for rent (such as how wide the doorways are, where the parking is located); or (iii) Figure out if your restaurant has accessible features off of your reservation app; Then you may be subject to a demand to pay or litigate. Such cases are on the rise across all 50-states. Learn about your responsibilities to keep your website compliant.

**ADA AND PREGNANT EMPLOYEES.** While the U.S. Supreme Court ruled that pregnant employees have to be granted accommodations that are granted to other workers similar in their ability or inability to work, it did not clearly define how employers should treat pregnant employees. If a company’s policy puts a significant burden on pregnant workers, the employer’s legitimate non-discriminatory reasons must be strong to justify the burden. If not, an inference of discrimination is created. Learn how to navigate this issue along with a basic approach to determine reasonable accommodation requirements under the ADA.

**ADA, FMLA AND WORKER'S COMPENSATION.** Learn how to navigate the "Bermuda Triangle of ADA, FMLA and Workers' Compensation. Light duty may be required as an ADA accommodation and the distinction is often difficult to navigate. Learn how to apply each statute and in which circumstances.

**BENEFITS.** Do you have proper plan documents? Do you know the difference between your documents? Do you still have to offer insurance under ACA? Can you give someone a severance that goes into a 401(k) or would that violate federal tax law? These and other questions are important to know to keep you from being fined and sued. Learn about the legal basics for benefits to keep your company out of financial trouble.

Contact Karen S. Elliott if you are interested in hearing about these or any other legal topics as Eckert Seamans is a full-service law firm and provides an array of business advice.

**Contact:** Karen S. Elliott, Esq., 804-788-7762, [kelliott@eckertseamans.com](mailto:kelliott@eckertseamans.com)

## Endeavor Capital

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Voted Best Financial Planning firm two years in a row by the readers of Virginia Living Magazine, Endeavor Capital, provides intentional and deliberate collaboration with business owners and their teams to deal with all issues related to the Risk Management, Liquidity and Long-Term Growth and Preservation of your Business. Through thoughtful discussion and understanding of a client's mission and vision as well as how they define success we coordinate and plan the path that gets them to accomplishing their ultimate objectives.

- Financial Planning 101: Components of a proper plan
- Financial Planning 202: Executing a proper plan
- Financial Planning 303: Living your plan
- Establishing a Comprehensive Benefits Strategy
- Succession plans and the future of your business
- Retirement plans 101
- Principles of Investing: Methods to creating and maintaining true financial freedom
- Integration of your business and family; family members and the business setting

**Contact:** Jonathan Kennedy, Jr., CLTC; (W) 804-888-9900, (C) 804-874-9531,  
[jkennedy@endeavorcapitalllc.com](mailto:jkennedy@endeavorcapitalllc.com)

## Henrico EDA

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The Henrico EDA is charged with fostering a productive and profitable business climate in Henrico through active support of companies already residing in Henrico and outreach to those that would like to locate here.

A strong business base with high-quality jobs and new capital investment allows Henrico to offer top-tier services to both companies and residents at low cost. Typical areas of business assistance include locating real estate for expansion or construction; workforce recruitment and retention; market and labor data; identifying eligible tax credits, grants, and incentives; assistance on growing your exports; and connections to resources, programs, and people. Our mission is to help you find continued success here in Henrico. Not in Henrico? We can help with that too!

**Contact:** Felicia Ainsa, 804-501-7522, [felicia@henrico.com](mailto:felicia@henrico.com)

## Insperty

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Since 1986, Insperty® CEO Paul Sarvadi envisioned making business owners' lives easier by taking HR and administrative burdens off their plates. So he decided to start a company with little more than 600 square feet of space and one telephone. Since then, Insperty has grown as a result of helping clients reach their goals.

Our business model is simple: We're dedicated to helping businesses succeed by taking care of the things that could be distracting you from the bigger picture. We do this by helping you control expenses, minimize risk exposure and maximize your opportunities for revenue generation.

**Contact:** Rebecca Stewart, 301-543-4184, [Rebecca.stewart@insperty.com](mailto:Rebecca.stewart@insperty.com)

## Segra

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At Segra, we lead with technology backed by a solid commitment to our customers. Following a successful merger of Lumos Networks and Spirit Communications, we are now proud to offer one of the largest and most advanced infrastructure networks in the eastern US. Our state-of-the-art fiber network covers over 21,000 miles that connects more than 9,000 on-net locations and 44 data centers throughout the Mid-Atlantic and Southeast and is delivered with our industry-leading service and reliability.

We provide customers with business solutions that include: Voice & Collaboration Services, WAN & Internet Services, Managed Network Services & Security and Advanced Data Center Services.

Presentation Topics:

- Transitioning your IT spending from capex to opex
- Disaster Recovery - What is it, why everyone needs a plan, what do all the acronyms mean
- Leading your team through change: talking about leading through a merger
  - Sharing our story of how we worked to merge two well established communications companies into one
  - How we approached the question of “Should we re-brand or not”
- How we successfully doubled the size of our Richmond Market
  - From 2017 – 2018 the local Richmond team saw a significant increase in we are happy to share with others our strategy and how we earned our success from a leadership perspective
- 2019 Telecommunications trends, what are they and what do they mean to my business: Broadband, SD-WAN, Disaster Recovery, 5G, Big Data, Smart Applications, Etc.
- What are key focuses for capital expenditures to grow business?
  - Example: community, net revenue, opportunity, etc.

**Contact:** Chris Shipman, VP/GM (804) 297-3421 [Christopher.Shipman@segra.com](mailto:Christopher.Shipman@segra.com)  
 Christy Bonifant, Marketing & Public Affairs (804) 297-3179 [Christy.Bonifant@Segra.com](mailto:Christy.Bonifant@Segra.com)

## South State Bank

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South State Bank is a regional bank headquartered in Columbia, SC, with a regional hub and eight branches in Richmond. The Bank offers a full suite of retail and commercial services along with treasury & cash management services, capital markets products, private banking services and a robust wealth management team. Our mission is to make a difference by being big enough to provide the expertise and solutions that our clients need to meet their financial aspirations, while remaining small enough and passionate enough to care that they do.

- How to Determine Your Company’s Debt Capacity
- Organizing and Assessing Your Personal Financial Goals
- Capital Markets – What Is It and How Can It Help?
- Navigating a Bump in the Road
- Everything You Wanted to Know About a Bank, but Were Afraid to Ask

**Contact:** Wes York, Senior Vice President, Commercial Team Leader: 804-412-7972, [wes.york@southstatebank.com](mailto:wes.york@southstatebank.com)  
 Robert Cowgill, Richmond Market President: 804-412-7978, [Robert.cowgill@southstatebank.com](mailto:Robert.cowgill@southstatebank.com)

## College Company

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A proud sponsor of the VACEO's since 2008, Colleen offers boutique style, hands-on design and web services. Established in 1998 and a *VA Certified Woman-Owned Micro Business*, our specialties include corporate branding, print, retail, trade and web design.

**Branding on a Budget: Identifying the most effective use for your dollars and how to use those dollars wisely.**

- How to creatively, effectively and affordably develop print, web and social media.
- Bolstering your brand and building brand awareness - maximize your efforts and dollars creatively.
- Creating powerful and evergreen sales materials that stand out in the crowd.

**Trade Show Standout Without Breaking The Bank**

Competing with the “big guys” at trade shows? How do you design and execute a booth that competes without breaking the bank? Colleen offers insights, advice and insider tips to offer a “grand brand” on a budget. Colleen and her team took home Best Overall Product Promo for Shenandoah Growers at Fresh Summit 2018 spending a fraction of the expense and beating competitors such as Dole, Pom, Chiquita and over 1200 more. And it all started with a toy truck from Amazon.....

**Contact:** Colleen College 434-242-1727 [cc@collegecompanydesign.com](mailto:cc@collegecompanydesign.com)

## Curtis & Company

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Since 1996, Curtis & Company has developed comprehensive and creative marketing strategies and executed them across a wide variety of print and online media. We become your strategic partner by managing all of your advertising and print related needs. Graphic design, photography, and printing are the core of what we do. We are proud of our success, building name and brand recognition for companies large and small. Talk to us about your objectives and discover the difference the right marketing plan can make for your business.

**Contact:** Curtis Blackwell, 804-739-8882, [cb@curtisandcompany.com](mailto:cb@curtisandcompany.com)

## TachLock Video

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TachLock Video incorporates a thorough background in brand development, advertising and marketing management into their process to maximize clients' video and photography objectives.

TLV's mission is to truly help you accomplish anything - be it to increase sales, educate customers, humanize your brand or communicate internally with your employees, having fun all the while.

**Using Video To Drive Your Business**

- The many ways video can drive value for your business
  - Educate your customers
  - Humanize your company and brand
  - Energize sales
  - Reduce tech support calls
  - Selling tools for your sales team
  - Engage with employees
  - Standardize HR policy and training communications
- Maintaining and enhancing your brand
- Getting your customers talking about you - testimonials on steroids
- Making your videos work for you with social media and SEO - you can't just spray and pray
- Keeping it affordable - in house videos vs. hired support and the ideal combination of the two
- How to effectively integrate produced videos into your website, social media, and communications
- What to expect in a video shoot day(s)
- Keeping it fun - an opportunity for your entire team to be involved
- The unexpected benefits of incorporating video into your marketing plan.

**Contact:** Glenn Lock, 434-249-5506 [glenn@tachlock.com](mailto:glenn@tachlock.com)