VA COUNCIL OF CEOS

Version 2021a- Mar 2021

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

VA COUNCIL OF CEOS

follow the leaders

Table of Contents

Fahrenheit Advisors

Members of our 80-person consulting and advisory team are happy to provide insights on any topics that are of interest to your roundtable. Here are some topic ideas by our practice areas for consideration. Contact Jay Carpenter to coordinate- 540-303-0050, jcarpenter@fahrenheitadvisors.com.

BUSINESS ADVISORY

- Managing through periods of disruption and distress
- Navigating systems and process integration after mergers and acquisitions
- Optimizing organizational design for growth
- Negotiating loans and bank workouts
- Managing practical cash flow
- Navigating restructuring for maximum efficiency and profitability
- Creating growth through strategy development and execution
- Expanding business with acquisitions, alliances, and outsourcing
- Designing and implementing scalable business processes to support growth
- Aligning measures and metrics to business strategy and objectives
- Planning successful succession/exit

FINANCE & ACCOUNTING

- Forecasting cash flows
- Managing working capital
- Measuring the true profitability and viability of your business – it's more than an income statement
- Turning financial data into information that informs business decisions
- Developing planning and forecasting capabilities to drive value creation
- Leveraging business Intelligence, scorecards, and dashboards to drive accountability

SALES TRANSFORMATION

- Maximizing revenue with a dynamic sales strategy
- Exceeding goals with sales training and methodology
- Increasing sales and sales team engagement with enhanced sales compensation strategies
- Closing more deals with improved CRM workflows
- Analyzing pricing and margin contribution to increase the bottom line
- Expanding your client base through new sales channels
- Boosting cross-sales by engaging all your employees in the sales process

HUMAN CAPITAL

- Capitalizing on change to retain and develop your talent
- Managing a multi-generational workforce
- Rethinking HR as risk management – people risk management
- Creating career paths in small organizations
- Developing managers to really manage (and free up your time)
- Identifying and using HR metrics
- Designing compensation strategies to motivate and empower employees

- Develop, implement, and adapt: talent strategies in the real world
- HR basics, tips, and tricks

EXECUTIVE SEARCH

- Upgrading members of your team
- Getting the most from your finance function
    - Do you have a real financial partner?
    - Do you need 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?
- Do you have the right people on the bus and are they in the right seat?
- Recruiting top talent in a tight labor market – top tips

Contacts: Rich Reinecke, 804-955-4423, rreinecke@fahrenheitadvisors.com
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Jay Carpenter, 540-303-0050, jcarpenter@fahrenheitadvisors.com
John Atkinson, 804-627-3555. , jatkinson@fahrenheitadvisors.com
Mark Vita, 804-513-6409, mvita@fahrenheitadvisors.com

Blue Ridge Bank, N.A.

In the community banking world, success is based on people! That is certainly the case at Blue Ridge Bank, N.A. where we know that with our experienced and engaged teammates, we promote a positive culture, attractive valuable customers and who will ultimately have great success. The more value our bank provides, the more our community and clients will benefit. We are committed to building on Blue Ridge Bank and legacy VCB's 80-year history now serving across the Commonwealth of Virginia from Luray, Harrisonburg and Winchester to the Northern Neck and greater Hampton Roads market including Virginia Beach 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 is truly "Uncommon Banking" from Blue Ridge Bank, N.A.!

Contact: Dusty Boyd, 804-518-2630, dusty.boyd@vcb.bank
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Roth Carroll, 804-435-4110, roth.carroll@vcb.bank

Robins School of Business

Executive Education at the Robins School of Business

The last twelve months have been challenging, to say the least. Much has been written about how leaders should act during these extraordinary times with calls for resiliency, empathy, and flexibility. We believe there are certain leadership skills that never go out of style, and focusing on these skills makes you a better leader every day:

- Product/Service Innovation
- Developing and Sustaining a Competitive Advantage
- Understanding the Global Economy
- Design Thinking
- Self-Discovery and Leadership Assessment
- Leading Teams to Success
- Effective Executive Communications
- Establishing Vision and Instilling Accountability in a Changing World
- Negotiating to Success
- The Ethical Leader
- Values-Based Decision-Making
- Leader as Coach

We start each engagement by getting to know your organization. Through exploratory meetings and strategic reviews, we get an understanding of where you are and where you want to go. Then we propose our best recommendation to get you there. This may be a customized program, individual classes, executive coaching, or any combination of these. The most important measure of our value to your organization is the improvement you see in your own metrics.

The Robins School of Business provides highly-qualified faculty to work with your organization to design and deliver relevant curriculum. They are recognized experts in their fields and active consultants, thus they bring a powerful blend of both academic perspective and corporate experience. Our faculty have developed and facilitated leadership development programs with senior leaders and high-potentials at organizations large and small across our region.

Contact: Joanne Even, 804-289-8014, jeven@richmond.edu

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.

Contact: Debbie Fisher, 804-289-8012, dfisher2@richmond.edu
Rich Boulger, 630-388-9396, rboulger@richmond.edu

Transact Capital

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

Contact: Steve Zacharias, 804-323-6868, steve@transactcapital.com
Patrick Morin, 804-323-6868, patrick@transactcapital.com
Jonathan Brabrand, 804-334-3698, jonathan@transactcapital.com

Warren Whitney

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
- Data-Based Decision Making- Leverage your data to make informed decisions

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?
- Data-Based Decision Making- Leverage your data to make informed decisions

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

Richard Kannan

- Enterprise Risk Management: What should be keeping you awake at night!

- Acquisition Integration – A comprehensive approach
- Best Practices to analyze Profitability & Segmentation
- Fraud: Understanding what to look for and how to avoid it

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

Irongate Capital Management, LLC

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**

PartnerMD

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 company.

Executive Health
Understanding Concierge Medicine: Is it Right for You? Your Company?
What is an Executive Physical and do you need one?

Employee Benefits
2021 Trends in Executive Health Benefits
Creating a Culture of Health at Your Workplace
COVID-19 Vaccines - Safety and Efficacy of Each

Wellness
Managing Stress and Improving Sleep
Meditation and Mindfulness
Yoga - Beginner and/or Desk Yoga
Nutrition and the Power of a Low Carb Lifestyle

Looking for something you don't see? Just ask and we probably have a physician or health coach who can speak to it.

Contact: Janet Kiss, Membership Development, 804-420-1212, jkiss@partnermd.com

Adams, Jenkins & Cheatham

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!

Contact: Jonathan Turner, 804-323-1313, jturner@ajccpas.com
John Denison, 804-323-1313, jdeniso@ajccpas.com

Atlantic Union Bank

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.

Contact: Cary Ayers, Senior Vice President: 804-327-5740, cary.ayers@bankatunion.com
John Lester, Assistant Vice President: 804-420-1264, john.lester@bankatunion.com

Eure Consulting

Running a small business can be frustrating, exhausting, and many times you feel like you're just making it up as you go along. But it doesn't have to be that way. Eure Consulting's proven approach helps you take the guesswork out of running your small business.

After working with Eure Consulting, CEOs are more confident, intentional, and have clarity about all aspects of their companies. They know exactly what their company does best, who they've got on their team and where they're going from here.

Don't reinvent the wheel, use our proven approach to grow your people and your profit.

- How to Make Your Leaders Coaches
- Defining Core Values
- The Fundamentals of Small Business Growth
- Adapting Your Leadership Style
- Hiring & Interviewing
- Defining Roles

- Giving Feedback
- Performance Reviews
- Managing Others and/or Managing Remotely
- DISC (Behavioral styles, how people communicate and work)
- Driving Forces (Motivational styles, what people value and focus on)
- Competencies (job related skills)
- Emotional Intelligence
- Defining Core Values

Contact: Clay Eure, Behavioral Analyst, clay@eureconsulting.com, 434-202-8590
Brad Eure, President & CEO, brad@eureconsulting.com, 434-202-8590

Jones Lang LaSalle

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

Contact: Charlie Polk, 804-200-6419, Charlie.Polk@am.jll.com
Scott Harrison, 804-200-6435, Scott.Harrison@am.jll.com

Keiter

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
- What new tax planning options should be considered this year?
- Understanding how the new Tax Act impacts your tax return
- 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

Contact: Gary Wallace, Managing Partner, 804-565-6025, gwallace@keitercpa.com
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Harold Martin, Valuation and Forensic Services, 804-273-6240, hmartin@keitercpa.com
Fonda Lang, 804-273-6208, flang@keitercpa.com
(Fonda can help you find the right expert at Keiter)

RCM&D

As one of the largest indepent insurance advisory firms in the United States, RCM&D is committed to protecting your business and its people. Our firm brings clients dedicated expertise in property & casualty commercial insurance, employee benefits solutions, retirement plan consulting, surety, risk management, third-party claim administration and more. This wealth of industry knowledge allows us to identify a more holistic picture of our client's insurance and risk needs. www.rcmd.com

- The ABC's of Cyber Liability
- Managing Risk on a Budget
- Risk and Insurance Landscape: Trends, Pricing, and Emerging Exposures
- Industry specific topics: RCM&D has a wealth of knowledge across a wide variety of industry groups including Education, Healthcare, Professional Services, Construction, Real Estate, Manufacturing, Non-profits and more.

Contact: James Shewey, 804-237-5912, jshewey@rcmd.com
Scott Martin, 804-237-5923, cmartin@rcmd.com

Spotts Fain

Spotts Fain is a full-service business law firm focused on advising, counseling, and representing clients in transactional and litigation matters. 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.

Below are a number of topics our lawyers have presented to various groups. We would be happy to tailor a presentation to your roundtable or forum on any of these topics.

- Administrative and Regulatory Appeals
- Construction Law
    - Minimizing Risk in the Construction Industry: Tips for Managing Employees and Administering the Project
    - Top Ten Contract Provisions Subcontractors Should Pay Attention To
    - What You Don't Know Can Hurt You: Recent Developments in Construction Law
- Corporate and Business Transactions
    - Succession Planning and Exit Strategies
    - Mergers and Acquisitions
    - Sale of a Business: When the Rubber Meets the Road
- Creditors' Rights, Bankruptcy and Insolvency

    - Best Practices in Consumer & Commercial Bankruptcy
- Employment Law
    - Employment Contracts and Severance Agreements
    - Employment Law Developments Related to COVID-19
    - Virginia's Final Permanent Standard for Infectious Disease Prevention: SARS-CoV-2 Virus that Causes COVID-19
- Energy and Environmental Services
- Estate Planning 101
- Financial Services
- Health Care Law for Providers
- Insurance Coverage and Litigation
- Intellectual Property and Information Technology
    - What to Do When You Get the Letter: Patents and Copyrights
    - How To Respond To Cease and Desist Letters in Trademark and Trade Secret Cases
- Land Use and Zoning
- Legislative and Governmental Relations
- Litigation
- Local Counsel - Virginia
- Products Liability
- Real Estate & Development
- Real Estate Litigation

Contact: Tom O'Brien, 804-697-2070, tobrien@spottsfain.com
Eddie Lumpkin, 804-697-2033, elumpkin@spottsfain.com

Avenue 8 Advisors

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
- Transformational leadership
- Leading through Crisis
- Demystifying executive presence
- Connecting Leadership + Identity: taking a dynamic approach to Diversity, Equity, and Inclusion

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
- Meaning Conversations: how to speak truth and build trust
- The case for developing your team

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

Cornerstone Valuation

- 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

Dixon Hughes Goodman

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?

Contact: Stephen Kimberlin, 804-474-1261, Stephen.kimberlin@dhgllp.com

Eckert Seamans

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

Endeavor Capital

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

Sandler Training RVA

The World's Largest Training Organization.

Specializing in solving the tough, complex business challenges through proven systems for communicating with, developing, and motivating people.

- **Management**
    - Hiring Winners
    - Developing a Culture of Accountability with Your Sales Function
    - Territory and Account Management Simplified
    - Understanding Your People
    - Why Coaching is the Catalyst for High Performance
    - The Four Hats Managers Must Wear

- **Sales**
    - Selling in Uncertain Times
    - Why Salespeople Fail
    - Authenticity and Sales – Can they Co-Exist?
    - The Psychology Behind the Sell
    - Could Asking Questions Be the Answer?
    - Building a Prospecting Plan
    - Break the Rules and Sell More

- **Miscellaneous**
    - Time Management in Sales
    - The Building Blocks of Success
    - Empty the Head Trash
    - Breaking Through Your Comfort Zone
    - Who you "R" is not who you "I" – the Role of Self-Image in Success

Contact: Robin Green, 804-914-1723, robin.green@sandler.com

South State Bank

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
Robert Cowgill, Richmond Market President: 804-412-7978, Robert.cowgill@southstatebank.com

Wellspring Workforce

At Wellspring Workforce, we empower organizations to recruit and retain talent. As recruiting consultants, our passion is to help you identify people who are a great fit for your company's specific needs. We work with your team to build and execute recruiting processes unique to the growth that your company needs.

- Building a recruiting engine
- Developing a career framework
- Constructing a talent roadmap
- How onboarding impacts recruiting and your company
- What is a candidate pipeline and why do you need one?
- How building your employer brand boosts recruiting
- Doubling the size of your company in 12 months in a sustainable way
- How small companies attract big talent
- Conducting a talent gap analysis to uncover the gap between existing talent and required talent

Contact: Nathan Swanson, Co-Founder and CEO, 434-964-7011, nswanson@wellspringworkforce.com

Williams Mullen

Williams Mullen delivers comprehensive legal services and innovative solutions to a broad range of industries. Our lawyers provide seasoned guidance; first working to understand our client's individual businesses and goals, then providing solutions that mirror those priorities and needs. The benefit of choosing Williams Mullen is our deep bench of approximately 240 lawyers. In addition to providing a full-range of corporate and litigation services, working as a team enables us to effectively draw upon the firm's resources in specialty areas as needed, including tax planning and executive compensation, real estate, intellectual property and employment, among others. We pride ourselves on our ability to help clients manage legal and business risks in a timely and cost-effective fashion.

- **Brand Management and Intellectual Property**
    - Protecting your IP through patents, trademarks, copyrights, and trade secrets, and maintaining an IP portfolio
    - Licensing arrangements
    - Software and e-commerce strategy, including review of web content and privacy policies
- **Commercial Contracts**
    - Vendor and customer contracts; contract manufacturing, procurement, distribution, and supply agreements
    - Independent contractor, consulting, and sales representative agreements
    - Confidentiality and non-disclosure agreements
- **Emerging Growth Companies**
    - Capital raising strategies
    - Structuring convertible debt, angel, venture capital, and private equity financings
    - Federal and state securities law compliance
    - Equity compensation strategies unique to emerging growth companies
- **Employee Benefits and Executive Compensation**
    - Structuring and managing employee benefits, including stock options and other stock-based compensation, profits interests, 401k plans, pension plans, and health plans
    - Executive compensation, including supplemental executive retirement plans, deferred compensation, and severance arrangements
- **Entity Formation and Strategic Planning**
    - Choice of entity and formation of new entities
    - Stockholders and Operating Agreements: alignment of owners on management, financial, and buy-sell matters
    - Preservation of family wealth and succession planning
- **Government Contracts**
    - Government regulatory and business consulting
    - Protests, third party litigation, False Claims Act defense

    - Investigations and compliance
- **International Trade and Business**
    - Moving products, people, services, and information across borders
    - Navigating the intricacies of trade and customs compliance and enforcement issues, including those related to the Foreign Corrupt Practices Act, ITAR, export controls and economic sanctions
- **Opportunities and Challenges under the Biden Administration**
    - Business planning in light of recent or proposed Executive Orders, policy directives and agency regulations
- **Selling your Business, Acquisitions, and Joint Ventures**
    - Preparing your business for sale and navigating the due diligence process
    - Structuring the transaction to achieve maximum tax efficiencies
    - Deal terms: what's market
- **Tax**
    - Corporate and partnership tax planning, including formations, reorganizations, liquidations, distributions, and consolidated group issues
    - Tax audits, appeals, and litigation
    - Planning in light of recent and proposed changes to federal and state tax laws

Contact: Andrew White, 804-420-6243, awhite@williamsmullen.com

College Company

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

Curtis & Company

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

TachLock Video

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.

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