



2024 NETWORKING ROSTER



Share Transformational **Experiences** • Build Deeper **Personal** Relationships • Uncover **Innovative** Solutions

First Name	Last Name	Company Name	Company City	State/ Providence	CEPA Since
Jesse	Abercrombie	Edward Jones	Plano	TX	2017
George	Adams	Schneider Downs & Co., Inc.	Pittsburgh	PA	2021
Melinda	Adams	M&T Financial Partners	San Antonio	TX	2022
Kevin	Ahaus	Ahaus Tool & Engineering	Richmond	IN	-
Amy	Ahrens	One Digital	Knoxville	TN	2021
Rhylie	Alaimo	Merrill Lynch	Auburn Hills	MI	2020
Drew	Allen	Instrumental Wealth	Tampa	FL	2023
Bradford	Alliger	Alliger Financial	Exton	PA	2023
Calvin	Allmon	Edward Jones	Lafayette	GA	2021
Garrett	Alton	Wilmington Trust	Atlanta	GA	2020
S. Mark	Alton	Morgan Stanley	Syracuse	NY	2020
Brian	Amann	CPA Edge, LLC	Lakewood	CO	2021
Darrell	Amy	Strategic Innovation Engine	Conway	AR	-
Elizabeth	Anderson	Whittier Trust	Pasadena	CA	2020
Deidre	Anderson	Exit Planning Institute	Westlake	OH	-
Anthony	Apostolidis	LPL Financial LLC	Stockton	CA	2023
Keith	Apton	UBS Financial Services, Inc.	Washington	DC	2018
Landon	Archangelo	GFG Solutions	Tampa	FL	2023
Jill	Arena	Arena Enterprises Ltd	Cleveland	OH	2024
Jeff	Armstrong	Cultivate Advisors	Oak Brook	IL	-
Robert	Arroyo	RLA Financial	Clearwater	FL	2024
Tim	Asche	Capstone Financial Group	Baxter	MN	2023
Keith	Atneosen	Freedom Summit Consulting LLC	Bothell	WA	2020
Nicole	Austin	Thrivent	Monroe	WI	2023
Jason	Ayala	InReach Wealth Advisors	Scottsdale	AZ	2023
Ruben	Bahena	Generational Equity, LLC	Dallas/Fort Worth	TX	-
Brian	Baird	Raymond James	Hackensack	NJ	2023
Appaiah	Ballachanda	LPL Financial LLC	Henrico	VA	2023
Raj	Bansal	Bmo Private Banking	London	Ontario	2017

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First Name	Last Name	Company Name	Company City	State/ Providence	CEPA Since
Beth	Barrett Lawther	Cresset Capital	Atlanta	GA	2021
Brad	Barros	Private Risk Capital	Centreville	VA	2022
Connor	Barth	Sterling Foundation Management	Reston	VA	-
Chris	Barto	Washington Trust Bank	Spokane	WA	2022
Todd	Battaglia	MG&A Wealth	Plantation	FL	-
Tommy	Battle	Financial Designs Business Advisors	Forest	VA	2022
Ethan	Bays	UBS Financial Services, Inc.	Portland	OR	2019
Peter	Becchina	eXp Commercial	Blue Bell	PA	2022
Bill	Becker	Corporate Finance Associates	Fort Lauderdale	FL	2023
Charles	Bedard	ERGO Comps LLC	Houston	TX	2021
Brian	Bedford	Edward Jones	Maryland Heights	WI	2022
Gordon	Bell	The Midland Group	Fort Wayne	IN	2009
Ryan	Belmer	Morgan Stanley	San Diego	CA	2020
Teri	Benson	Pando Partners Wealth	Orlando	FL	2021
Aaron	Berg	ASE Private Wealth	Greenville	SC	2024
Michael	Berlin	Oovity, LLC	Brecksville	OH	-
Ken	Bero	Quist Insights	Denver	CO	-
David	Berry	Merrill Lynch	Austin	TX	2022
Roger	Berry	Merrill Lynch	Austin	TX	2019
Scot	Berryman	UBS Financial Services, Inc.	Lake Oswego	OR	2020
Justin	Blau	Melville Capital	New York	NY	-
David	Blauzvern	CSG Partners	Boston	MA	-
Walter	Blijleven	Blijleven Corporate Finance	Willemstad	Curacao	2016
Dawn	Bloomer	Productive Pressure	Manhattan Beach	CA	2023
James	Bly	Ernst & Young, LLP	Pittsburgh	PA	-
Steve	Boltz	Charles Schwab	Indianapolis	IN	2017
Susan	Bordash	UBS Financial Services, Inc.	Stamford	FL	2020
Isabel	Botero	Generation 6	Evanston	KY	2021

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Robert	Bove	The 4:8 Group	Avon	OH	2024
Dan	Bowdey	FocalPoint Business Coaching & Training	Boulder	CO	2021
Victoria	Bowen	Bowen Enterprises LLC	Chelmsford	MA	-
Brian	Bowen	Integrity Financial Planning Inc	Roanoke	VA	2023
Marcus	Bowman	CLA	Nashville	TN	2022
Michael	Brady	Generosity Wealth Management, LLC	Boulder	CO	2024
Michael	Brady	Maus Software LLC	Tampa	FL	-
Paul	Brahim	Wealth Enhancement Group	Pittsburgh	PA	2023
Micah	Brandenburg	Weekapaug Consulting	Greenville	SC	2020
David	Brasfield	Intelligence Driven Advisers	Scottsdale	AZ	2022
Jeff	Breit	Thrivent	Onalaska	WI	2024
Kevin	Brick	Brick Business Law, P.A.	Tampa	FL	2024
Daniel	Brindle	FSG, LLC	Crystal Lake	IL	2022
Wililam	Brinkley	First Citizens Bank	Charlotte	NC	2019
Tom	Brinson	Ninety	Park City	UT	-
Bob	Brooks	Practice Endeavors, LLC	Alexandria	OH	2015
Robin	Brower	Robin L Brower	Geneva	OH	2023
Eric	Brown	Edward Jones	Smyrna	TN	2022
Zach	Broyles	Capitaliz	Denver	CO	-
Chris	Brubaker	Hantzmon Wiebel LLP	Charlottesville	VA	2020
Bradley	Bruce	mFORCE Capital	Fort Worth	TX	2020
Chris	Brumfield	1834, a division of Old National Bank	Milwaukee	WI	-
Bob	Bubser	FPA Wealth Management	West Chester	NJ	2021
Dan	Buehrle	Elevate by Principal	Milwaukee	WI	-
Daliah	Bui	BeachFleischman PLLC	Tucson	AZ	2023
William	Bulgin	Raymond James	Jacksonville	FL	2022
Jordan	Burg	CSG Partners	New York	NY	-

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Shep	Burr	Kingfisher Growth Strategies	Naples	FL	2024
Ronna	Bury-Prince	Ambassador Consulting Solutions	Warrenville	IL	2023
Scott	Bushkie	Cornerstone Business Services	Green Bay	WI	-
Michael	Butler	Footprint Capital	Granville	OH	2023
Meghan	Buxton	REA & Associates	New Philadelphia	OH	2020
Monte	Byrd	M.C. Byrd Wealth Management	Bellville	TX	2023
Jonathan	Byrd	Byrd Capital, LLC	Covington	LA	2019
Rusty	Cagle	ASE Financial Advisory Group	Greenville	SC	2023
Joseph	Calao	UBS Financial Services, Inc	Waco	TX	2020
Lisa	Calongne	LPL Financial LLC	Metairie	LA	2024
Kris	Canaday	Resurgence Investments	New Market	TN	2024
Jordan	Cantrell	Edward Jones	Washington	NC	2023
Stephen	Capizzi	Apex Exit Advisors, LLC	Alpharetta	GA	2008
Matt	Cardella	Raymond James	Hinesville	GA	2020
Jim	Carlisle	Dinsmore & Shohl LLP	Pittsburgh	PA	-
Neal	Carlson	Thrivent	Minneapolis	MN	2024
Kristin	Carlson	KD Lake Country Team LLC	Naples	FL	2023
Peter	Carr	Morgan Stanley	Ponte Vedra Beach	FL	2021
Steve	Case	Michigan Retirement Advisors	Bloomfield	MI	-
Isabella	Case	Michigan Retirement Advisors	Bloomfield Hills	MI	-
Peter	Chadwick	Pinnacle Wealth Advisors	Grand Rapids	MI	2020
Hannah	Chalker	ExitMap LLC	San Antonio	TX	2022
Brandon	Chase	HUB International	Fort Worth	TX	2021
Ray	Chase	Raymond Chase	Ponte Vedra	NJ	2017
L Dean	Chavis	Northern Trust	Naples	FL	2023
Scott	Chelberg	Retirement Solutions, Inc.	Carlsbad	CA	2023
Robert	Chenier	UBS Financial Services, Inc	Tacoma	WA	2023
Darren	Cherry	FocusCFO	Columbus	OH	2018
John	Chong	Madison Insurance Group	Plano	TX	-

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Brian	Church	OneAscent	Franklin	TN	2021
David	Ciccarelli	Lifetime Financial Growth	Canton	OH	2023
Roman	Ciosek	Hightower Advisors	Harrison	NY	2017
Nicholas	Cirbo	Invesco	Atlanta	GA	2023
Paul	Cissel	Growth Caddie	Vero Beach	FL	2019
David	Clayman	Twelve Points	Concord	MA	2024
Greg	Cleary	Pinnacle Business Guides	Minneapolis/St. Paul	MN	-
John	Clidas	Synovus Trust Company	Fort Lauderdale	FL	2023
Tracy	Clifford	Royal Business Bank	Aliso Viejo	CA	2023
Chris	Coates	Stevens & Lee	Bala Cynwyd	PA	-
Marc	Cobane	Alpha Financial Partners LLC	Lexington	KY	2019
David	Cohn	GranVida Wealth at Steward Partners	San Antonio	TX	2023
Jim	Colbourne	LPL Financial LLC	Roswell	GA	2023
Lou	Colella	JFS Wealth Advisors	Hermitage	PA	2020
Neil	Collins	Edward Jones	Richmond	British Columbia	2023
Ernie Lee	Colvin, II	Edward Jones	Murfreesboro	TN	-
Margaret	Coniam	Exit Planning Institute	Westlake	OH	-
Whitney	Coon	Breakwater Accounting & Advisory	Wilmington	DE	-
April	Cooper	Wealthsource	Knoxville	TN	-
Chloe	Copple	Barrington Wealth Management	Chicago	IL	2021
Dustin	Cordier	StepZero Coaching	Fayetteville	GA	2024
Tina	Corner Stolz	LXCouncil	St Petersburg	FL	-
Brian	Cose	Cornerstone Business Services, Inc.	Green Bay	WI	-
Chris	Cousins	Financial Architects, Inc.	Farmington Hills	MI	2020
William	Crew	Crew Wealth Management	San Luis Obispo	CA	2024

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Mark	Cross	Highland Trust Partners	Athens	GA	2021
Jake	Crowley	Planned Value Group	North Attleboro	MA	2022
Michael	Crowley	Planned Value Group	North Attleboro	MA	2022
Shina	Culbertson	Quist Valuation	Boulder	CO	2020
Scott	Cunningham	South Mountain Wealth Management	Cottonwood Heights	UT	2023
Judi	Cunningham	Trella	Toronto	Ontario	2019
Frank	Curtin	High Speed Consulting	Huntsville	FL	2023
David	Cushing	D.P. CUshing & Associates	North Canton	OH	2024
Marc	Danile	John Hancock Investments	Houston	TX	2023
Susan	Danzig	Susan Danzig, LLC	Moraga	CA	-
Brenda	D'Arville	D'Arville and Co., Inc.	Dunnellon	FL	2023
Justin	Davis	Impact Financial Strategies	Fort Collins	CO	2023
John	DaWalt	Merrill Lynch	Columbia	SC	2020
Chris	Dawson	Dawson and Associates PWM	St. John's	Newfoundland and Labrador	2023
Eduardo	De la Rosa	Solid Ground Financial	Tampa	FL	2023
Tom	Deans	Détente Financial Press Ltd.	Toronto	Ontario	-
Kylie	DeBari	Trainual	Phoenix	AZ	-
Rachel	DeCarolis	Northstar Financial Planning	Windham	NH	2023
Ela	Degen	The Founders Group	San Diego	CA	-
Ted	DeLisi	Carson Wealth	Mooreville	NC	2022
Anthony	DeLorenzo	CBRE	Newport Beach	CA	-
David	DeLuca	Morgan Stanley	Ponte Vedra Beach	FL	2021
Mike	Deming	First Citizens Bank	Atlanta	GA	2022
Tony	Dempsey	Sunstate Business Brokers	Bradenton	FL	2021
Richard	DeSantis	The Stream Plan	Westlake Village	CA	-
Michael	Desiato	Business Transition Specialists LLC	Lighthouse Point	FL	2019
Will	Deupree	Raymond James	Memphis	TN	2023

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Julie	Diamond	EOS Worldwide	Kalamazoo	MI	-
Dominick	DiBona	Raymond James	Boca Raton	FL	2023
Douglas	Dickey	DRDA, LLC	Houston	TX	2010
William	Dicristofaro	Integrity Benefit Partners	West Hartford	CT	2022
Michael	Dietrich	UBS Financial Services, Inc.	Westfield	NJ	2020
John	Dini	MPN Inc (ExitMap)	San Antonio	TX	2018
Jeff	Ditsworth	TrueNorth Companies	West Des Moines	IA	2023
Craig	Doescher	Doescher Group	Clarkston	MI	2018
Tom	Doll	TD Partners	Bellingham	WA	2023
Beth	Dominguez	Raymond James	Bellevue	FL	2021
Abby	Donnelly	The Leadership & Legacy Group	Greensboro	NC	-
Timothy	Dougherty	MMEPA	Horsham	PA	2020
Thomas	Duggan	UBS Financial Services, Inc	Miami	FL	2021
Madelyn	Dunlap	The ReWild Group	Denver	CO	-
Devesh	Dwivedi	Higher Valuation	Calgary	Alberta	2019
Walt	Eckert	Blue & Co, LLC	Westerville	OH	2021
Keith	Eckhardt	Edward Jones	Colorado Springs	CO	2022
Erin	Eiras	InVestra Financial	Jacksonville	FL	2023
Howard	Eisenberg	WealthTec	Fulton	MD	2023
Emily	Elfallah	Integrity Financial Planning Inc	Roanoke	VA	2024
Paul	Emrick	Morgan Stanley	Allentown	PA	2023
Todd	Eppert	FocalPoint Coaching, Inc.	West Chester	OH	2021
Sunny	Erdman	Shorebridge Wealth Management	Pittsburgh	PA	2021
Amanda	Evans	UBS Financial Services, Inc.	Houston	TX	2020
George	Ewins	Raymond James	Burlington	VT	2020
Randy	Fackler	BSSF	Camp Hill	PA	2017
Frank	Fantozzi	Return on Life Wealth Partners	Cleveland	OH	2022
Tom	Fediuk	Family Business Strong	Louisville	KY	2021

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Matt	Feigin	Merrill Lynch	Miami	FL	2023
Rick	Feltenberger	ForwardFocus	Ocala	KS	2018
Laura	Ferguson	The Value Builder System™	Toronto	Ontario	-
Windus	Fernandez Brinkkord	Trilogy Financial Services	San Diego	CA	2020
Jessica	Fialkovich	Exit Factor	Dallas/Fort Worth	TX	2023
Jeremy	Finger	Riverbend Wealth Management	Myrtle Beach	SC	2023
William	Finnerty	UBS Financial Services, Inc.	Washington	DC	2017
Teresa	Finney	Raymond James	Austin	TX	2020
Joseph	Firth	Cityplace Heights	Dallas	TX	2020
Gary	Fisher	G.L. Fisher Capital Management	Flint	MI	2023
James	Flesher	National Philanthropic Trust	Jenkintown	PA	2023
Jorge	Flores	LWM Advisors	Boston	MA	2024
Andrew	Fossen	AVP LLC	Barboursville	VA	-
Justin	Fowler	CLA	St. Louis	MO	2022
Micah	Fraim	Fraim, Cawley & Company, CPAs	Roanoke	VA	2024
Manny	Frangiadakis	Twelve Points	Concord	MA	2021
Maryellen	Frank	UBS Private Wealth Management	New York	NY	2020
Kenneth	French	Edward Jones	Victoria	TX	2022
Derek	Frosh	UBS Wealth Management	Winston-Salem	NC	2023
Paul	Fulena	CreativeOne	Overland Park	KS	-
Tonio	Fulena	CreativeOne	Overland Park	KS	-
Josh	Fuller	Fuller Automotive Service	Auburn	MA	-
Michelle	Fuller	John Hancock Investment Management	Boston	MA	2023
John	Fulwider	gear80	Lincoln	NE	2023
Luigi	Fuoco	TFG Business Advisory, LLC	North Palm Beach	FL	-
Shane	Gaddy	SGL Wealth	Gainesville	GA	2020

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Robert	Gardner	Gardner Wallace Financial Solutions	Addison	TX	2013
Kyle	Gardner	Tennyson Advisory Group	Frisco	TX	2023
Michael	Garrison	Values Based Mindset	Roanoke	VA	2023
Luke	Gawronski	Barnum Financial Group	Bluffton	SC	2020
George	Georgiades	G Squared Ventures	College Station	TX	2020
Seth	Getz	NuVescor	Grand Rapids	MI	-
Karim	Ghandour	Legacy Line	Dubai	United Arab Emirates	2023
Nick	Giacoumakis	Business Succession Advisors	North Andover	MA	2017
Sean	Gibbon	JFS Wealth Advisors	Hermitage	PA	2022
Kaveh	Gilanshah	UBS Financial Services, Inc.	Washington	DC	-
Zach	Gildehaus	Edward Jones	St. Louis	MO	2022
Joseph	Gitto	Blue Sky Exit Planning	Winter Garden	FL	2020
Thomas	Gogarty	Thomas P. Gogarty Jr., CPA	Dagsboro	DE	2013
Steve	Gold	UBS Financial Services, Inc.	Miami	FL	2021
Jolie	Goldberg	The Laurel Group	New York	NY	-
Robert	Goldsmith	Northern Edge Advisors LLC	New York	NY	-
Richard	Goldstein	Goldstein Patent Law	Red Bank	NJ	2023
Matthew	Goldston	ABIP CPAs and Advisors	Houston	TX	2020
Rebecca	Gonzalez	Financial Clarity by Design, Inc	Spencer	WI	2021
Justin	Goodbread	One Digital	Knoxville	TN	2017
John	Gould	Morgan Stanley	Cincinnati	OH	2023
Angela	Grabovsky	Impact Financial Group	Indianapolis	IN	2021
Dan	Gramann	Cultivate Advisors	Milwaukee	WI	-
Jan	Graybill	Legacy Planning Partners	Allentown	PA	2015
Sarah	Greifenberger	Arbor Valuation and Consulting, LLC	Ann Arbor	MI	2020
James	Griest	RedTail Consulting, LLC	Fort Wayne	IN	2023
Dallin	Griffin	NFP	Salt Lake City	UT	2023

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Robert	Griffin	Onondaga Community College Small Business Development Center	Syracuse	NY	2022
Joel	Groskreutz	Thrivent	Reedsburg	WI	-
Nick	Guida	Guidance Wealth Advisors	Lebanon	NJ	-
Steve	Haarstad	Enterprise Minnesota	Minneapolis	MN	2021
Joanna	Habegger	Invite Wealth Management	Indianapolis	IN	2023
Ken	Haffey	Marcum LLP	Cleveland	OH	2017
Thomas	Hall	Carson Wealth Management	Cottonwood Heights	UT	2024
Rich	Hall	Rich Hall Group, LLC	Houston	TX	2023
Linda	Hamilton	Linda A Hamilton CPA LLC	New York	NY	2020
Chad	Hamilton	Mariner Wealth Advisors	Overland Park	OK	2023
Pam	Hankins	Alliance Trust Company of Nevada	Reno	NV	-
John D.	Hanson	Accelerated Revenue Inc	Lewis Center	OH	-
Kyle	Hanson	Madison Insurance Group	San Juan	Puerto Rico	-
Chris	Harben	Penn State University	Erie	PA	-
David	Hardin	Cultivate Advisors	Chicago	IL	2023
Sean	Hardy	UBS Financial Services, Inc.	Cleveland	OH	2020
Joseph	Hargrove	Merrill Lynch	Chicago	IL	2024
Suzanne	Harp	Generational Equity, LLC	Richardson	TX	-
Allen	Harris	Berkshire Money Management	Dalton	MA	2017
Andy	Harris	STS Capital	Toronto	Ontario	-
Shel	Hart	FL Venture Catalysts	Celebration	FL	2023
Sara	Hartary	Quantive	Arlington	VA	2021
Reid	Hartsfield	TD Partners	Jacksonville	FL	2022
Ryan	Hastings	BSSF	Camp Hill	PA	2020
Beckie	Hayes	EOS Worldwide/Merchab	Wheaton	IL	2020
Bill	Hays	Edward Jones	Farmington	NM	2023
Curtis	Hearn	Symphony Wealth	Atlanta	GA	2024

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Brent	Heflin	BizEquity	Philadelphia	PA	-
Neal	Hegge	Fiduciary Trust Company	Boston	MA	2023
Mark	Hegstrom	BOSS	Minneapolis	MN	2019
Dan	Heinrichs	Niemann Group	St. Louis	MO	-
Lawson	Hembree	Merrill Lynch	Fort Smith	AR	2021
Peter	Henrich	Merrill Lynch	Chicago	IL	2024
Lee	Henry	Golden Shield Business Brokers	Norman Park	GA	-
Jay	Henry	Edward Jones	Summerville	GA	2022
Nathan	Hershman	Edward Jones	Uniontown	OH	2022
Zachary	Hersman	Raymond James	Boca Raton	FL	2021
Sarah	Hewitt	Fox Rothschild	New York	NY	2021
Greg	Hill	Keating Inc.	Lawrence	KS	2023
Margaret	Hill	Corporate Value Metrics	Westborough	MA	-
Jamie	Hilton	UBS Financial Services, Inc.	Tiverton	RI	2020
Michael	Hines	CPC Advisors	Atlanta	GA	-
Taylor	Hodges	Southern Capital	Tallahassee	FL	2024
George	Hodges-Fulton	GHF LLC	Reston	VA	2021
Thomas	Hoffman	Knox McLaughlin Gornall & Sennett	Erie	PA	-
Travis	Holland	Edward Jones	North Andover	MA	2024
William	Holliday	Elite Wealth Management	San Diego	CA	2021
Pamela	Hopman	BIC Consulting LLC	Casa Grande	AZ	2022
William	Horan	Fortis Lux Financial	New York	NY	2023
Lisa	Horn	Fortis Fire and Safety	Winneconne	WI	2018
Denis	Horrigan	CT Wealth Management LLC	Farmington	CT	2020
Joshua	Horton	Big Sky Wealth Advisors	Great Falls	MT	2023
Janice	Hosea	Weekapaug Consulting	Greenville	SC	-
Bruce	Hosler	Hosler Wealth Management LLC	Scottsdale	AZ	2020

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Sean	Howard	UBS Financial Services, Inc.	Buffalo	NY	2022
John	Howard	Market Breakthrough Specialists	Fort Myers	FL	2023
Beverly	Howdeshell	Edward Jones	St. Louis	MO	-
Dawn	Hryshko	Hryshko & Associates	Strongsville	OH	2021
John	Hudspeth	Merrill Lynch	Naples	FL	2023
Jeremy	Hus	Barnum Financial Group	Shelton	CT	2020
John	Huss	AQR Capital Management, LLC	Greenwich	CT	-
Craig	Huston	Summit Achievers	Pompano Beach	FL	2023
Sean	Hutchinson	Ready for Next Global	Denver	CO	2008
Robert	Ibrahim	Ibrahim Wealth Advisory Group	Somerville	NJ	2020
Andy	Inman	Springs Wealth Group	Colorado Springs	CO	2021
Neal	Inscoe	Equiti LLC	San Diego	CA	-
Joshua	Irons	River Avenue Digital	Prospect Park	PA	-
Grace	Ivins	Eagle Corporate Advisors	Las Vegas	NV	-
James	Jack	UBS Financial Services, Inc.	New York	NY	2018
Steve	Jackson	Edward Jones	Lexington	NC	2022
Jeff	Jacobs	Apex Financial Group	Sheboygan	WI	2022
Henry	Jakobsze	UBS Financial Services, Inc.	Chicago	IL	2020
Lisa	James Pope	Merrill Lynch	Chicago	IL	2023
Nick	Janus	Ashbury Consulting LLC	Blaine	WA	2023
Charles	Jarrett	Merrill Lynch	Naples	FL	2019
Scott	Jenkins	ExitSmarts	Charleston	SC	-
Matt	Jensen	National Christian Foundation	Columbus	OH	-
Linda	Jensen	Heart Financial Group	Olympia	WA	2023
Kyle	Jerman	Edward Jones	Chetek	WI	2022
Jaime	Jeroszko	Paramax Corporation	Williamsville	NY	-
Nathan	Johns	MendenFreiman, LLP	Atlanta	GA	2020
Terry	Johnson	Generational Group	Dallas	TX	-
Jared	Johnson	Capitaliz	Pine	CO	-

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Agatha	Johnson	WillKate	Sioux Falls	SD	2023
Hough	Johnson	Business Transition Advisors LLC	Virginia Beach	VA	2020
Jason	Johnson	UBS Financial Services, Inc	Winter Park	FL	2024
Brandon	Jordan	Impact Advisors Group LLC	Duxbury	MA	2020
Catherine	Juon	EOS Worldwide	North St. Paul	MN	2023
Anthony	Kaczkowski	Rom LLC	Marco Island	FL	2023
John	Kamprath	Grupp Organization	Coeur d'Alene	ID	2018
Ann	Kaplan	Rent A Genius	Fort Myers	FL	2023
Karekin	Kaprelian	Ameriprise Financial	Scottsdale	AZ	2019
Manohar	Kasetty	MassMutual Perimeter	Peachtree Corners	GA	2024
Jeffrey	Kates	The Founders Group	Freehold	NJ	2016
Jason	Katz	Bartlett Wealth Management	Cincinnati	OH	2019
Andy	Kauth	UBS Financial Services, Inc.	Denver	CO	2020
Bob	Kawabe	Kawabe & Associates, LLC	Honolulu	HI	2020
Adam	Kazalski	FourFront Wealth Management	Lakewood Ranch	FL	2023
Charles	Kedra	FPA Wealth Management	West Chester	PA	2016
Charles	Keepman	Economics Partners - A Ryan Company	Salt Lake City	UT	-
Dianne	Kelley	FreshVue Business Solutions	Tucson	AZ	2023
Bradley	Kelly	BNY Mellon Wealth Management	New York	NY	2023
Peter	Kelsch	Maus Software	Tampa	FL	-
Becky	Kemp	SDR Ventures	Denver	CO	-
Charles	Kendall Cole	Ameriprise Financial	Austin	TX	2023
David	Kent	PEAK Business Operations Group	Hickman	TN	2020
Gerald	Kepner	KepnerCPA	Dallas	TX	2021
Joshua	Kettleson	Edward Jones	St. Louis	MO	2023
Julie	Keyes	KeyeStrategies	Minneapolis City	MN	2015
Andrea	Kimball	UBS Financial Services, Inc.	Syracuse	NY	2018

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Michael	King	National Christian Foundation	Alpharetta	GA	-
Mark	Kipp	Prime Capital investment Advisors	Overland Park	KS	2023
Jason	Klein	UBS Financial Services, Inc.	Buffalo	NY	2019
Ryne	Kloeppel	Edward Jones	Parkville	MO	2023
Mary Pat	Knight	Leaders Inspired	Chicago	IL	-
Steven	Kohnke	Denver Business Coach	Denver	CO	2022
Margaret	Koosa	The Alchemists, LLC	Stamford	VT	2024
Daniel	Kramer	Raymond James	Hackensack	NJ	2023
Jordan	Kraus	Vintage Financial Partners	Rockville	MD	2021
Mark	Kravietz	Aline Wealth	Melville	NY	2013
Rick	Krebs	Business Sales Group	Heber City	UT	2022
Scott	Krinsky	Trainual	Tempe	AZ	-
Todd	Krough	Minnesota Bank and Trust	Edina	MN	2020
Kent	Kuhlmann	Carson Wealth	Napa	CA	2021
Joseph	Kunze	Merrill Lynch	Pittsburgh	PA	2022
Marc	Laborde	Rockefeller Global Family Office	Houston	TX	2018
Jeff	Lahr	Prime Capital Investment Advisors	Leawood	KS	-
Victor	Lam	UBS Financial Services, Inc.	Portland	OR	2020
Patrick	Lambrechts	Bol International	Boxmeer	Netherlands	2018
Matt	Lang	Morgan Stanley	West Conshohocken	PA	2017
Scott	Lang	Exit Planning Institute	Westlake	OH	-
Matthew	Langsford	Canaccord Genuity	Toronto	Ontario	2022
Christina	Laramy	Elevate by Principal	Milwaukee	WI	-
Steve	Laska	Carson Wealth	Winter Park	FL	2021
Leslie	Lauer	RBC Wealth Managment	Atlanta	OH	2018
Tammy	Laurent	Edward Jones	Shakopee	FL	2023

**As of April 17, 2024 | Contact information revoked to protect attendee privacy.*

First Name	Last Name	Company Name	Company City	State/ Providence	CEPA Since
Zachary	Lauzon	Richard Brothers Financial Advisors	South Portland	ME	2022
Charles	Laverty	Buckingham Strategic Wealth	Poland	PA	2016
Eric	Lawton	Impact Financial Wealth Management, LLC	Guilford	CT	2023
Andrew	Leary	Capital Group, Private Client Services	Los Angeles	CA	-
Steven	LeClair	Raymond James Financial-Lasera Capital Partners	Columbus	OH	2018
Jon	LeDoyen	UBS Financial Services, Inc.	Dunwoody	GA	2018
Bob	Lee	Mariner Wealth Advisors	Highlands Ranch	CO	2022
Frank	Legan	Cedar Brook Group	Cleveland	OH	-
Carli	Lehr	Brown Plus Transitions	Camp Hill	PA	2023
Kevin	Leigh	Univest	Philadelphia	PA	-
Darlene	Leonard	Smith Leonard PLLC	Summerfield	NC	-
Tom	Lewandowski	Edward Jones	Ballwin	MO	-
Shelley	Lightfoot	Strazzeri Mancini	San Diego	CA	2019
Sheryl	Linck	The Trust Company of Tennessee	Knoxville	TN	2018
Chris	Linde	BlackCloak	Lake Mary	FL	-
Jim	Lipari	UBS Financial Services, Inc.	Lee's Summit	MO	2018
Seth	Liskey	Middlebrook Wealth	Staunton	VA	2023
Michael	Lissner	Acropolis Investment Management	Chesterfield	MO	2008
Brian	Long	JC & Company	Lancaster	OH	2018
Blake	Lord	Ryan LLC	Salt Lake City	UT	-
Glenn	Lowe	Smith Leonard PLLC	High Point	NC	-
Meghaan	Lurtz	Couplr	Kansas City	MO	-
Christopher	Lussier	Raymond James	Worcester	RI	2023
Caleb	Lyons	Agency Brokerage Consultants	Melbourne	FL	2024
Robert	Macaulay	Brick House Strategic Wealth	Newtown	PA	2023

**As of April 17, 2024 | Contact information revoked to protect attendee privacy.*

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Chris	Macfarlane	Wells Fargo	Naples	FL	2020
Brian	Macho	Thrivent	Minneapolis	MN	2024
Scott	MacKenzie	Hampton Square Wealth Mgt	Andover	NJ	2024
Ashley	Madden	Hutchinson Family Offices	Greensboro	NC	2023
Greg	Maddox	Cultivate Advisors	Chicago	IL	-
Thomas	Madigan	UBS Financial Services, Inc.	Guilford	CT	2020
Kimberly	Maez	Chrysalis Wealth Management	Englewood	CO	2021
Kim	Mahoney	Pacific Advisors	San Diego	CA	2021
Ed	Major	Edward Jones	Fort Pierce	FL	-
Vince	Manna	Bank of Texas	Dallas	TX	2023
Kori	Manus	HPA	Upper Arlington	OH	2020
Jim	Mari	CLA	King of Prussia	PA	2021
Varun	Marneni	CPC Advisors	Atlanta	GA	2022
Peter	Marshall	Marshall Financial Group	Hunt Valley	MD	2021
Paul	Marshall	MetLife	New York	NY	-
Amy	Marshall	Breakwater Accounting & Advisory	Wilmington	DE	-
Brad	Mart	PivotPoint Company	Oswego	IL	-
Chris	Martin	CBRE	Newport Beach	CA	2023
Scott	Mashuda	REAG	Cleveland	OH	-
Vincent	Mastrovito	Prometis Partners	Grand Rapids	MI	2017
Lauren	Matteo	Principal	Minnetonka	MN	2021
William	McBride IV	Morgan Stanley	La Jolla	CA	2022
Ryan	McCaslin	EHTC	Grand Rapids	MI	2024
Ed	McClellan	Edward Jones	Ann Arbor	MI	2022
Kyle	McCord	K.B. McCord & Co.	McCordsville	IN	2024
Shane	McCormick	FPA Wealth Management	West Chester	PA	2020
Melanie	McDonald	Pursuit Wealth Management	Greenacres	FL	2018
Andrew	McFetridge	John Hancock Investment Management	Boston	MA	2022

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Travis	McGann	Cogent Wealth Management	Glendale	AZ	2023
Ryan	McGarghan	Synergy Tax Solutions, LLC	Belmont	NH	2024
Andrew	McGee	UBS Financial Services, Inc.	Magnolia	NY	2020
Evan	McGrath	RAA / Allworth Financial	Addison	TX	2023
Miranda	McKee	Encore Advisory Group	Houston	TX	2023
Thomas	McKeen	United Franchise Group	West Palm Beach	FL	-
Beth	Mckinley	Thrivent	Hummelstown	PA	2023
Drew	McLaughlin	UBS Financial Services, Inc.	Clayton	MO	2015
Mark	McLennan	AQR Capital Management, LLC	Greenwich	CT	-
Charles	McLucas	Charitable Trust Administrators, Inc.	San Clemente	CA	-
Eric	McMullen	Alliance Trust Company of Nevada	Reno	NV	-
Jack	McNamara	Landmark Wealth Management Group	Hudson	WI	-
Diane	McNeal	Dynamic Financial Strategies	West Palm Beach	FL	2020
Juli	McNeely	Business Clarity by Design	Spencer	WI	2021
James	Mead	UBS Financial Services, Inc.	Bend	OR	2020
Dana	Menard	Twin Cities Wealth Strategies, Inc.	Maple Grove	MN	2021
Peter	Mendall	Mendall Financial Group	Augusta	ME	2021
Patrick	Mercier	Fifth Third Wealth Advisors	Pittsburgh	PA	-
Kyle	Mertz	TrueNorth Companies	West Des Moines	IA	-
Sam	Messina	Paramax Corporation	Rochester	NY	2017
Suzanne	Metzger	Chatters, Metzger & Co	Coeur d'Alene	ID	2020
Mark	Metzler	Kreischer Miller	Horsham	PA	2016
Deborah	Meyer	WorthyNest	Babcock Ranch	FL	2020
Catherine	Michael	Strazzeri Mancini	San Diego	CA	-
Matthew	Michini	Michini Wealth Management	Tampa	FL	2023
Erin	Mickels	CLA	Minneapolis	MN	-

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Arkady	Milgram	Milgram Financial and Insurance Services, LLC	Westlake Village	CA	2021
Catherine	Miller	Pando Partners Wealth	Ponte Vedra Beach	FL	2021
Mark	Miller	North Oaks Financial Services	White Bear Lake	MN	2022
Katie	Milton Jordan	Freenew LLC	Kerrville	TX	2022
Joseph	Mjelde	Edward Jones	Burke	VA	2023
Brian	Moen	NewLifeCFO	Dallas	TX	2023
Lori	Moen	Catalyst Group ECR	Nokomis	FL	2019
Brian	Mohler	Eagle Corporate Advisors	Las Vegas	NV	-
Chuck	Mohler	Eagle Corporate Advisors	Las Vegas	NV	2015
Michelle	Moller	Edward Jones	Petaluma	CA	2022
Manuel	Monasterio	UBS Financial Services, Inc.	Santa Fe	NM	2020
Daniel	Montilla	PNC	Plantation	FL	2020
Michael	Morgan	Wilmington Trust	Atlanta	GA	2020
Amy	Morin	Thriv Coaching	Tucson	AZ	2024
Katherine	Morosani	Edward Jones	Ashville	NC	2022
Gerardo	Moya	International Financial Advisor	Pinecrest	FL	2020
Mike	Mumford	UBS Financial Services, Inc.	Spokane	WA	2019
Christian	Muntean	Vantage Consulting	Anchorage	AK	2019
William	Murphy	UBS Financial Services, Inc.	Cleveland	OH	2018
Kim	Murphy	Edward Jones	Santa Rosa	CA	2023
Stephen	Murray	Growfast HR Solutions LLC	Ponte Vedra	FL	-
John	Myklusich	AmbitionCFO	Orlando	FL	2022
Meili	Myles	Myles Advisors	Sugar House	UT	-
Dave	Naidu	Socialincs	Newport Beach	CA	2022
Eric	Negron	Forefront Wealth Partners	Austin	TX	2022
Dan	Negroni	Launchbox	San Diego	CA	-
Bjorn	Nesvold	Landmark Wealth Management Group	Hudson	WI	2023
Bill	Nicholson	Exit Strategy Advisors	Dallas	TX	2022

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Michael	Niemann	Niemann Group LLC	St. Louis	MO	-
Greg	Nowak	United Franchise Group	West Palm Beach	FL	-
Patrick	O'Brien	PNC	Cleveland	OH	2013
Gerald	O'Brien	What Big Brands Know	Denver	CO	-
Drew	Oestreicher	Spinnaker Trust	Portland	ME	2019
Brian	Oettinger	Vintage Financial Partners	Rockville	MD	2021
Tim	Oleary	High Speed Consulting	Tampa	FL	-
Angie	O'Leary	Royal Bank of Canada	Minneapolis/St. Paul	MN	-
Andy	Oliver	Oak Hill Business Partners	Brookfield	WI	2021
George	Oliver	West Fork Wealth Management of Raymond James	Fort Worth	TX	2022
Shawn	Oliver	UBS Financial Services, Inc.	Napa	CA	2021
Timothy	Oliver	Grogan, Hesse & Uditsky, P.C.	Oakbrook Terrace	IL	2023
Chad	Olivier	Olivier Group	Baton Rouge	LA	2022
Keith	Olson	Williston State College SBDC	Williston	ND	2017
Nancy	Olzack	Raymond James	Chicago	IL	2020
Trevor	Opp	Thrivent	Bismarck	ND	2023
Jacqueline	Oprean	Lumina Wealth Management	Canton	OH	2023
Tammi	Ortega	Alpina Wealth Management	Lake Oswego	OR	2024
Erik	Owen	Oak Hill Business Partners	Brookfield	WI	2019
Peter	Owh	Champlin & Associates	Pittsford	NY	2023
Teresa	Paetznick	Paetznick Consulting	Rosemount	MN	2023
Katherine	Paisley	Paisley Advisors	Lake Worth Beach	KY	2024
Dana	Palma	Edward Jones	Egg Harbor Township	NJ	2022
Heather	Parbst	CLA	Gainesville	FL	2021
Michelle	Parker	Edward Jones	Peoria	IL	2022
Mary	Patton	Huntington National Bank	Columbus	OH	2018
Dan	Paxton	ExitSmarts	Mt. Pleasant	SC	2021

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Mark	Payne	Edward Jones	Punta Gorda	FL	2024
Rachel	Peeler	Independent Financial Services	Land O Lakes	FL	2024
Laura	Pennington	Rockefeller Global Family Office	Washington	DC	2023
Blake	Peterson	Keystone Financial Services	Omaha	NE	2023
Kelley	Phan	Align Business Advisory	Winter Park	FL	-
Michael	Phillips	EOS Worldwide	Charlotte	NC	-
Norman	Piche	Norman Piche & Associates	Sudbury	Ontario	2022
Allen	Pierce	UBS Financial Services, Inc,	Denver	CO	2020
Russ	Pixler	Mariner Wealth Advisors	Sioux Falls	SD	2020
Neil	Poehlmann	Edward Jones	Killeen	TX	2021
Matthew	Pohl	The ReWild Group	Denver	CO	-
Dan	Poortenga	NCF Michigan	Ada	MI	-
Josh	Pottinger	UBS Financial Services, Inc.	Austin	TX	2019
Cheryl	Powers	Align Strategic	Orlando	FL	2023
Marc	Pozzuoli	Journey Alliance	Tampa	FL	-
Tamara	Prato	Connect The Dots LLC	St. Paul	MN	2022
Brad	Pries	Sawtooth Business Advisors	Minneapolis	MN	2023
Kathleen	Pritchard	John Hancock	Loudon	TN	2022
Jeffrey	Pupo	UBS Financial Services, Inc.	Boca Raton	FL	2022
Oliver	Pursche	Wealth Spire	Westport	CT	2022
Jim	Quigley	Barrington Wealth Management	Amelia Island	FL	2022
Reese	Raffo	Strazzeri Mancini	San Diego	CA	-
Angela	Raitzin	Cresset Capital	New York	NY	2022
Donald	Ratledge	Ratledge & Associates LLC	New Castle	DE	-
Kurt	Rauzi	Dedicated Capital Advisors	San Francisco	CA	2021
Christina	Rebel-Otterbach	CRO Management Consulting LLC	Norcross	GA	2017
Michael	Remey	Merrill Lynch	Red Bank	NJ	2019

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Michael	Renwick	Vesta CPA	Fond du Lac	WI	-
Kevin	Rex	The Stream Protection Plan	Los Angeles	CA	-
Nicole	Rex	Watermark Insurance Services, Inc.	Westlake Village	CA	2022
Nicole	Rex	Watermark Insurance Services, Inc.	Westlake Village	CA	-
Diana	Reyes	Edward Jones	Valencia	CA	2022
Frank	Reynolds	Frank Reynolds & Co.	Daytona Beach	FL	2023
Michael	Rice	Lipschultz Levin & Gray LLC	Northbrook	IL	2022
Randall	Richard	Richard Brothers Financial Advisors	Portland	ME	2022
Ken	Rinehart	UBS Financial Services, Inc.	Cincinnati	OH	2020
Jacyn	Ring	REAG	Pittsburgh	PA	-
Tom	Rippberger	Affiliated Advisors	Minneapolis	MN	-
Hector	Rivera	Forest Hills Financial Group	New York	NY	2023
Alina	Rivera	Advising Puerto Rico, LLC	San Juan	Puerto Rico	2021
Patrick	Roberson	Cinergy Wealth Life & Legacy of Raymond James	Cincinnati	OH	2023
Ty	Robinson	Edward Jones	Robbinsville	NJ	2022
Michael	Rodman	Best Practices of America	Rancho Santa Fe	CA	2017
John	Roney	FocalPoint Business Coaching	Greenville	SC	2024
Chris	Ronzio	Trainual	Scottsdale	AZ	-
Travis	Rose	Pinnacle Wealth Management Group	Antigo	WI	2020
Sarah	Rosen	BlackCloak	Boulder	CO	-
Chase	Ross	Exit Planning Institute	Westlake	OH	-
Luke	Rother	Yetworth Insurance Solutions	San Rafael	CA	2024
Jeffrey	Ruderman	Capital Group PCS	Los Angeles	CA	2020
Keeli	Rule	Rule Growth Capital	Frisco	TX	2023
Brent	Rupnow	Ameriprise Financial, Inc.	Irvine	CA	2020
Tom	Rush	Yuma Investment Group	Yuma	AZ	2022

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Mark	Russell	SES ESOP Strategies	Fort Worth	TX	2022
Renee	Russo	Rise up Business Coaching	Burnaby	British Columbia	2022
Lauren	Russo	Berkshire Money Management	Dalton	MA	2019
Lori	Russo	Rule Growth Capital	Frisco	TX	-
Kenzie	Ryback	Knox Law	Erie	PA	-
Nicholas	Sakellis	ASE Private Wealth	Greenville	SC	2023
Ken	Sanginario	Corporate Value Metrics	Boston	MA	-
Charis	Santillie	Charis Your Life®	San Francisco	CA	-
Al	Santosuosso	Commonwealth Financial Group	Bedford	NH	2021
Paul	Sapiro	UBS Financial Services, Inc.	Hartford	CT	2017
Michael	Sauer	Scorpion	Bozeman	MT	2022
Rik	Saylor	Redde Zone Business Consulting	Fairfield	OH	2020
Scott	Scheer	Vista Financial Strategies, LLC	Appleton	WI	2019
Joseph	Scheid	Legacy Advisors Arizona, LLC	Scottsdale	AZ	2020
Michael	Schmid	Capital Group	Los Angeles	CA	2022
Thomas	Schmidt	Thomas A Schmidt & Associates Inc	Oklahoma City	OK	2024
Valerie	Schmitz	Kelly Day Financial Services, LLC	Columbia Station	OH	2019
Michael	Schodrof	UBS Financial Services, Inc.	Chicago	IL	2022
Eric	Schultz	Journey Alliance	Chattanooga	TN	-
Mike	Schultz	Edward Jones	Tempe	AZ	-
Mike	Schuster	Schuster Anderson Wealth Advisors	Grand Island	NE	2023
Gustavo	Schutt	Gustavo Schutt	Ciudad de Buenos Aires	Argentina	2018
Dennis	Schwartz	Raymond James	Beachwood	OH	2022
Jonathan	Schweiger	Edward Jones	Suamico	WI	2021
Cameron	Scott	BerryDunn	Portland	ME	2019

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Joe	Seetoo	Morton Wealth	Westlake Village	CA	2018
Benjamin	Segal	UBS Financial Services, Inc.	Southampton	NY	2020
Jenny	Sellers	Private Risk Capital	Centreville	VA	-
Don	Settina	RetireRight Financial Planning	Bridgeville	PA	-
Brandon	Sexton	John Hancock	Boston	MA	2022
Andrew	Shantz	UBS Private Wealth Management	Fairfield	CT	2017
Sally	Shelton	Oxford Financial Group, Ltd.	Atlanta	GA	-
Michael	Sheppard	Thrivent	Milwaukee	WI	2021
Jeff	Sheridan	Ahaus Tool & Engineering	Richmond	IN	-
Macy	Siefert	Buckingham	St. Louis	MO	2023
Kerry	Siggins	StoneAge, Inc.	Durango	CO	-
Katherine	Silk	Sterling Foundation Management	Reston	VA	-
Roger	Silk	Sterling Foundation Management	Reston	VA	-
David	Silver	Instrumental Wealth, LLC	Tampa	FL	2023
David	Silverman	Emeritus Business Coaching LLC	Englewood	CO	2023
Adam	Silverman	AQR Capital Management, LLC	Greenwich	CT	2023
Melisa	Silverman	Avenue M Advisors INC	San Diego	CA	2016
Stephen	Simon	Stifel	San Francisco	CA	2020
Bill	Simonet	Simonet Financial group	Kyle	TX	-
Carter	Sims	Madison Insurance Group	Atlanta	GA	-
Mark	Sims	Madison Insurance Group	San Juan	Puerto Rico	-
Lee	Small	John Hancock	Franklin	TN	2022
Adam	Smart	Verde Capital Management	Village of Clarkston	MI	2023
Randy	Smith	Fairway Financial	Casselberry	FL	-
Jeffrey	Smith	Coeur Private Wealth	Coeur d'Alene	ID	2020
Daniel	Smith	First Citizens Wealth Management	Columbia	SC	2021

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Michael	Smith	Avidian Wealth Solutions	Houston	TX	2023
Kris	Snyder	Ninety	Park City	UT	-
Lisa	Snyder	Abby Connect	Scottsdale	AZ	-
David	Solis	First Citizens Bank	Raleigh	NC	2023
Marni	Spence	CLA	Orlando	FL	2022
Christopher	Spires	Raymond James	Bluffton	SC	-
Gerry	Spitzer	Questar Capital Partners	Scotch Plains	NJ	2020
Sharon	Spooler	Chief Outsiders	Houston	TX	-
Sam	Springer	The Trust Company of Tennessee	Knoxville	TN	-
Brian	Stallcop	Sherpa Wealth Strategies, LLC	Bend	OR	2022
Guy	Steele	Edward Jones	Kailua	HI	2024
Laurie	Stegenga	Foresight Capital Management Advisors, Inc.	Saline	MI	2020
Andrea	Steinbrenner	Exit Consulting Group	San Diego	CA	2024
Michael	Stephens	Fiduciary Trust Company	Boston	MA	2021
Brian	Stephens	Legacy Venture Group	Lithia	FL	2020
Benjamin	Stewart	Summit Group Strategies	Evening Shade	AR	2024
Michael	Stier	FocusCFO	Charlotte	NC	2020
Aaron	Stine	Maus Software	Tampa	FL	2022
Skyler	Stokes	Aloha Wealth Partners	San Diego	CA	2021
Morgan	Stone	Avidian Wealth Solutions	Austin	TX	2020
Bill	Stone	Edward Jones	Longmont	CO	2021
Joe	Strazzeri	Strazzeri Mancini	San Diego	CA	2016
Thomas	Struckmeyer	Edward Jones	Hillsborough	NC	2022
Doug	Sue	Franklin Templeton	New York	NY	-
Doug	Sullivan	SEPA Florida	Bradenton	FL	2022
Martha	Sullivan	The Family Business Consulting Group	Waunakee	WI	2016
Owen	Sweeney	UBS Financial Services, Inc.	Scottsdale	AZ	2021

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Christopher	Swink	Northern Trust	Tampa	FL	2019
Carl	Szasz	Verde Capital Management	Village of Clarkston	MI	-
John	Tate	Mt. Kilimanjaro Business Consulting LLC	Morrow	OH	2022
Violetta	Terpeluk	IndigoFlow Financial Group	Roseville	CA	2020
Deshon	Terrell	Exit Planning Institute	Westlake	OH	-
Stephanie	Thiel	Morgan Stanley	Albuquerque	NM	2024
Christina	Thomas	Paramax Corporation	Buffalo	NY	-
Christina	Thomas	Paramax Corporation	Rochester	NY	-
David	Thompson	Raymond James	Ashland	KY	2024
Bradley	Thompson	Morgan Stanley	Charlotte	NC	2023
Drew	Thompson	Generational Equity, LLC	Dallas/Fort Worth	TX	-
Tyler	Thompson	Raymond James	Griffin	GA	2020
Mark	Thorndyke	Merrill Lynch	Naples	IL	2020
Frans	Tijssen	Sjebema B.V.	Rijkevoort	Netherlands	2017
Christopher	Tomes	AMPF	Chicago	IL	2024
Jason	Tonne	Frost Brown Todd, LLP	Cincinnati	OH	-
Todd	Torquato	REAG	Mount Joy	PA	-
Joshua	Torres	Charles Schwab	Dallas	TX	2020
Mike	Trabert	Marcum LLP	Mayfield Village	OH	2011
Mark	Travis	Skylight Intermediaries	Cortland	NY	2023
David	Trent	Absolute Capital	Little Rock	AR	2023
Anne	Trinh	Family Wealth Counseling	Austin	TX	2023
Chad	Trpkosh	PFG Advisors	Lubbock	TX	-
Brian	Trzcinski	MassMutual	Springfield	MA	2018
Blair	Tudas	Cojourn	Los Angeles	CA	-
Ali	Tumino	Questar Capital Partners	Paramus	NJ	-
John	Turner	Live Oak Bank	Hugo	MN	-
Larry	Turow	PivotPoint Business Solutions	Indianapolis	IN	2022
Trace	Udall	Udall Financial LLC	Mesa	AZ	2023

**As of April 17, 2024 | Contact information revoked to protect attendee privacy.*

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Grant	Ulrick	LPL Financial LLC	Danbury	CT	2023
Matt	Urankar	Exit Planning Institute	Westlake	OH	-
Brian	Urie	Mountain America Investment Services	Salt Lake City	UT	-
Nick	Uva	Southern Veterinary Partners	Birmingham	AL	2021
Antonio	Vaglica	MassMutual	Miami	FL	-
Jonathan	Van Arsdale	Exitology	Evergreen	CO	-
Scott	Van Den Berg	Century Management Financial Advisors	Austin	TX	2023
William	VanCanagan	Datsopoulos, MacDonald & Lind, P.C.	Missoula	MT	2021
Wendy	VanCleve	Fountain Financial Group	Memphis	FL	2023
Donald	VanderZwaag	Skyway Associates LLC	Comstock Park	MI	2015
Ravi	Vaswani	MetLife	Irvine	CA	-
Benito	Vattelana	Edward Jones	Hagerstown	MD	2023
William	Velasco Jr	Merrill Lynch	Charleston	SC	-
Erica	Vellanti	Vellanti Consulting	St. Petersburg	FL	-
Keith	Veres	HBK Corporate Finance	Fort Myers	FL	2019
Darren	Violette	Profectus Financial Partners	Whitinsville	MA	2023
Kristy	Visconti	Merrill Lynch	Scottsdale	AZ	2023
Derek	Vogel	Aloha Wealth Partners	Del Mar	CA	-
Kristin	Vonnes	Edward Jones	Jacksonville	FL	-
Kariann	Voorhees	Voorhees Law Group, PC	Chino	CA	2019
Mark	Wade	Echelon Wealth Strategies, LLC	Brentwood	FL	2020
Edwin	Waingart	Janney Montgomery Scott	Greenville	SC	2024
Raymond J	Waldron	Exitology	Evergreen	CO	2022
Glenda	Waldschmidt	National Christian Foundation	Alpharetta	GA	-
Lisa	Walsh	Raymond James	Buffalo	NY	2024
Dylan	Walsh	Maus Software	Tampa	FL	-
Paulina	Walters	Chief-Assist	Allen	TX	2023

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Samuel	Walters	Capitliz	Denver	CO	-
Angela	Warman	Angela Rose Consulting	Hinsdale	IL	2024
John	Warrillow	The Value Builder System™	Toronto	Ontario	-
Kimberly	Wasney	Ripples Edge Advisors	Denver	CO	-
Patrick	Wayland	Wayland Morin Wealth Group	Darien	CT	2023
Jonathan	Webb	National Christian Foundation	Arlington Heights	IL	-
Seth	Webber	BerryDunn	Portland	ME	2018
Timothy	Weerasiri	Ninety	Park City	UT	-
Allan	Weiss	Silverman Partners of Raymond James	Boca Raton	FL	2023
Laura	Wellon	UBS Financial Services, Inc.	Norcross	GA	2016
Gerald	Wernette	Rehmann	Farmington Hills	MI	2021
Wes	Wessel	Wessel & Associates	Willis	TX	-
Craig	West	Succession Plus	Sydney	Australia	2010
Maddi	White	Integrity Financial Planning Inc	Roanoke	VA	2023
Leigh	White	Myriad Advisor Solution	Waukee	IA	2023
Michael	Whitley	DRDA, PLLC	Houston	TX	-
Elizabeth	Whitteberry	Best Path Advisors	Colleyville	TX	2023
Sam	Wigand	Wigand Integrated Wealth	Colorado Springs	CO	2022
Mike	Wiggins	Edward Jones	Charleston	SC	2021
John	Wilfong	UBS Financial Services, Inc.	Memphis	TN	2020
Robert	Williaford	Titanium Strategies, LLC	Dallas	TX	2023
Ryan	Williams	BOSS	Edina	MN	2020
Phillip	Williams	P&P Business Solutions	St. Augustine	FL	2019
Jim	Wilson	Wilson Human Capital Advisory Inc.	Halifax	Nova Scotia	2022
Dan	Wilson	BizEquity	Philadelphia	PA	-
Mac	Winchester	Principal Asset Management	Annapolis	MD	2021
Amy	Wirtz	Family Business Consulting Group	Louisville	IN	2014

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First Name	Last Name	Company Name	Company City	State/ Providence	CEPA Since
Jim	Wisdom	JLW Financial & Insurance Services	Westlake Village	CA	2019
Conor	Wodarczyk	Exit Planning Institute	Westlake	OH	-
James	Wolfsberg	Wells Fargo	Boston	MA	2021
Jeff	Wood	Merrill Lynch	Saginaw	MI	2020
Jerry	Woods	BusinessPulse, LLC	Franklin	TN	2022
Alex	Woods	BusinessPulse, LLC	Nashville	TN	-
Monica	Woodward	Morgan Stanley	Houston	TX	2022
John	Woolley	The Partners Group	Portland	OR	2022
Dana	Wozniak	Edward Jones	Westminster	CO	2022
Todd	Yeiter	Thrivent	Minneapolis	MN	2024
Travis	York	3 and One Advisors	Atlanta	GA	2023
Macie	York	ExitMap LLC	San Antonio	TX	-
Lindsey	Young	Quiet Wealth	Baltimore	MD	2020
Daniel	Zugell	Business Transition Advisors/ ESOP Advisory	Pittsburgh	PA	-

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27881 Clemens Rd, Suite A, Westlake, OH 44145
exit-planning-institute.org
216.712.4244
epiglobal@exit-planning-institute.org
[linkedin.com/company/exit-planning-institute](https://www.linkedin.com/company/exit-planning-institute)
[@beyondCEPA](https://twitter.com/beyondCEPA)

