

A photograph of the Denver skyline at sunset, with several tall skyscrapers illuminated by the golden light of the setting sun. The sky is a mix of orange, pink, and blue. In the foreground, there's a blue graphic element that curves from the top left towards the bottom right, framing the text.

EPI DENVER | 2025

# MEMBER DIRECTORY

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Meet Our Community of Advisors  
and Chapter Leaders



Exit  
Planning  
Institute®

Denver Chapter

## Letter From Our President

**Dear CEPA® Colleagues and Fellow Exit Planning Professionals,**

Welcome to the latest edition of the Denver EPI Chapter Member Directory.

This directory is more than just a listing of names and contact information—it's a reflection of the dynamic, committed, and collaborative community we've built together. As our chapter continues to grow, this tool becomes increasingly valuable for fostering meaningful connections, deepening professional relationships, and creating new opportunities for collaboration.

Whether you're seeking to refer a trusted advisor, build your team of value creation professionals, or simply get to know your fellow members better, I encourage you to use this directory as a bridge. Behind every name is a story, a specialty, and a desire to support business owners in building, growing, and eventually exiting with success and purpose.

The Denver Exit Planning Institute chapter is here to help you make the most of your CEPA® designation, empower you to serve your clients as their most valuable advisor as you help your clients move from success to significance. Reach out to me or any of our board member leaders if you need support to help you succeed in maximizing your CEPA® designation.



**Jason "Wally" Waldron**  
*Founder & CEO, Exitology*

# BOARD MEMBERS



## Chapter President

### Jason "Wally" Waldron, CEPA®

**Exitology, Founder & CEO**

[Email](#) | [LinkedIn](#)

Jason "Wally" Waldron is the secret weapon behind owners, founders, and CEOs of B2B companies who use his unique profit acceleration strategies to grow faster and maximize the value of their business. When these owners feel trapped in their business, Exitology allows them to buy back their time and freedom. He lives in the mountains of Evergreen, Colorado, with his wife and two children.



## Chapter Vice President

### Steven Blazek

**BMO Private Bank, Managing Director, Private Wealth Advisor**

[Email](#) | [LinkedIn](#)

Steven is a lead advisor to high-net-worth individuals, families, and businesses, helping them align financial plans with their goals. He engages a Client Strategy Team to create dynamic strategies for wealth planning, philanthropy, and business transitions. With 33 years in financial services, he joined the firm in 2022. Steven holds a finance degree from Iowa State and serves on the Rocky Mountain Exit Planning Institute board, with past roles at Colorado Ballet and Rotary Club of Denver Mile High.



## Board Member

### Benjamin Bender, CEPA®

**Carson Wealth, Partner & Wealth Advisor**

[Email](#) | [LinkedIn](#)

Benjamin Bender is a Partner & Wealth Advisor with Carson Wealth and a Certified Exit Planning Advisor who helps business owners align their personal, financial, and business goals. As both an advisor and business owner, he understands the complexities of succession planning, having transitioned his own business and acquired another. At Carson Wealth, he provides exit planning, tax strategies, and financial guidance to help owners protect their legacy and exit on their terms.



## Board Member

### Shina Culberson, CEPA®

**Quist Valuation, President**

[Email](#) | [LinkedIn](#)

As the President of Quist, Shina brings over three decades of financial and valuation experience to her leadership and guidance of the firm. Shina graduated with a bachelor's degree in Economics from Claremont McKenna College, holds the CFA designation, and is a Certified Exit Planning Advisor working with clients to successfully transition their businesses. Ms. Culberson is on the faculty with the Exit Planning Institute, teaching the valuation section of its CEPA designation. Quist Valuation provides business valuation services for entrepreneurs and professional advisors. Over its 40 years in business, Quist has honed its approach to meet the client where they are along their business owner journey.



# BOARD MEMBERS



## Board Member

### Gary Curran

**Corporate Finance Associates Worldwide, Managing Director M&A**

[Email](#) | [LinkedIn](#)

Gary Curran is a consultative financial and management professional specializing in Mergers & Acquisitions. His 40 years of professional experience encompasses mergers & acquisitions, business ownership, corporate finance, and business development. He greatly values the importance of being professional and ethical in all aspects of relationships and engagements.



## Board Member

### George Helock

**LCG Advisors, Managing Director**

[Email](#) | [LinkedIn](#)

George Helock is a Managing Director at LCG Advisors, leading the firm's Western expansion and Regional HQ in Denver. LCG is a national transaction services firm, supporting lower/middle-market family-founder led businesses, investors, and lenders in buying, selling and financing. Services include investment banking, quality of earnings, lender due diligence, valuations, investigations, and CFO/IT consulting. Previously, George opened and ran the Colorado Market for an accounting advisory firm, scaling the team from 3 to 55 after beginning his career at Deloitte. His board service includes ACG Denver, EPI Denver, and Treasurer of First Tee – Colorado Rocky Mountains.



## Board Member

### Steven Kohnke

**Denver Business Coach, CEO & Value Growth Advisor**

[Email](#) | [LinkedIn](#)

Steven Kohnke is a Value Growth Advisor and CEO of Denver Business Coach, helping service-based businesses under \$20M grow enterprise value and scale. His firm improves people, processes, performance, and strategy, aligning the three legs of the stool—business, personal, and financial goals—for maximum results. Unlike high-level advisors, Steven and his team work hands-on weekly with business owners to ensure measurable progress toward exit goals 3-5 years out from an exit.



## Board Member

### Rachel Kramarchuk, CEPA®

**Carson Wealth, Partner & Wealth Advisor**

[Email](#) | [LinkedIn](#)

Rachel is a Wealth Advisor with Carson Wealth. Passionate about entrepreneurship, she particularly enjoys working with small business owners. As a Certified Exit Planning Advisor, she has contributed to the growth of the firm's Succession Planning services, helping business owners align their personal, business, and financial goals to help ensure they are well-prepared for a smooth transition when the time comes. She has a bachelor's degree from the University of Colorado and an MBA from California Lutheran University.

# BOARD MEMBERS

## Board Member



### Robert Lee

**Mariner, Senior Wealth Advisor**

[Email](#) | [LinkedIn](#)

Robert guides business owners through a strategic process to plan for expected and unexpected transitions. He designs customized investment and exit strategies tailored to clients' financial situations, business dynamics, and family goals. Using expertise in financial and estate planning, wealth management, and tax-advantaged strategies, he helps clients navigate life transitions. Robert's goal is to build long-term relationships, crafting comprehensive plans to safeguard wealth and legacy. With a team approach, he coordinates top experts in valuation, exit, estate, tax, risk, and wealth planning, ensuring business value converts to personal wealth for a secure future.

## Board Member



### Alison McQuillan, CEPA®

**The Streamliners, CEO & Founder**

[Email](#) | [LinkedIn](#)

With a foundation in theoretical math (BA) and business administration (MBA), Alison has established herself as a transformational leader focused on architecting core business functions that drive substantial increases in corporate valuation and EBITDA performance for middle market businesses. Throughout her 25-year career, Alison has distinguished herself as a strategic change agent who excels at implementing sustainable solutions, designed for creating maximum efficiency.

## THE STREAMLINERS



### **Strategic Core Business Function Optimization for Increased EBITDA and Valuations**

The Streamliners specializes in transforming lower middle market companies (\$15M to \$100M+ revenue) by optimizing core business functions and systems that directly impact valuation multiples.

While many growing enterprises focus exclusively on revenue generation, we address the operational inefficiencies that silently erode EBITDA and depress company valuations. Most growth-stage companies develop their internal processes organically as they scale, creating significant operational inefficiencies that remain invisible. These systemic weaknesses typically reduce EBITDA by 15-25% and can dramatically impact business valuations.

### **Our Methodology**

The Streamliners implements a proprietary optimization framework that systematically transforms how your organization converts disparate, siloed Structural Capital into a functional integrated system within a 90-Day Sprint cadence.

- *Comprehensive Value Analysis:* We conduct detailed mapping of all lead-to-cash systems, identifying high-impact optimization opportunities with precise implementation roadmaps
- *Valuation-Driven Approach:* Each strategic recommendation includes quantified EBITDA improvement calculations and projected valuation impact
- *Performance Guarantee:* Our engagements deliver an industry disruptor of a true ROI guarantee (ask us for details)

### **Ideal Partnership Candidates**

Our approach creates exceptional value for lower middle market businesses that are:

- Positioning for strategic exit within a 3-5 year horizon
- Considering an acquisition or having undergone a recent acquisition
- Navigating scale-related operational challenges
- Seeking to improve profitability without sacrificing quality

We work closely with Business Value Advisors to enable the Value Acceleration Methodology™ supporting the overall success of the team and businesses. Strategic optimization of core business functions delivers both immediate performance improvements and significant valuation enhancement—creating compelling value for shareholders and positioning companies for premium exits.

# SPONSORS



## Denver Business Coach

### **For Business Owners, from Business Owners**

Long days, dealing with customers, stagnant growth, little support...it's easy to let day-to-day problems get in the way of the freedom you envisioned when you started your business.

You know that a solution is out there—a new system or process, a better team, a strategic plan—but with all the treading water you're doing in the business right now, the solutions feel practically impossible to find.

At Denver Business Coach, we get it.

Our team of business coaches and advisors have all run businesses from start-up to exit, so we don't just understand the issues that you're facing right now, we've worked through them ourselves.

Since 2011, we've helped hundreds of business owners just like you build valuable businesses that deliver time, freedom, and financial success.

We're committed to helping you reach your goals and build a stronger, self-sustaining business.



## Colorado Gives Foundation

### **Who We Are**

We are the Colorado Gives Foundation (formerly Community First Foundation). We connect people, ideas and nonprofits. We are a Jeffco grantmaker and statewide we invest to build the capacity of nonprofits and donors through online fundraising on ColoradoGives.org. We also support nonprofit endowments and donor services to help make a greater impact.

### **What We Believe**

We believe that a community is built by connection, and everyone can make good happen. Together, we strive to build resilient, connected and thriving communities, which is good for everyone.

### **What We Do**

Colorado Gives Foundation is a community foundation (a 501(c)(3) public charity) dedicated to improving the lives of people in a defined geographic area. We work statewide to help donors, whether they are individuals, organizations, or corporations, with giving accounts that fulfill their charitable interests. We also make grants to nonprofits serving Jefferson County to ensure that all of Jeffco is thriving. Unlike other community foundations, we also run an online giving platform – ColoradoGives.org – that connects donors to nonprofits across the state of Colorado and powers a giving day every December called Colorado Gives Day.



## RubinBrown

Certified Public Accountants & Business Consultants. RubinBrown is one of the nation's leading accounting and professional consulting firms with a commitment to building personal relationships and delivering totally satisfied clients.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Attorneys



### Aaron Burton

**Fairfield & Woods, Attorney**

[Email](#) | [LinkedIn](#)

Aaron represents clients in trust and estate planning, administration, and litigation, as well as in complex tax and business law matters. His practice focuses on guiding individuals, families, and businesses through sophisticated estate planning strategies, trust administration, and fiduciary matters.

## Business Brokers



### Carolyn Ryan, MBA

**Main Ascent | Business Brokers & Advisors, Founding Partner**

[Email](#) | [LinkedIn](#)

Carolyn is a Founding Partner at Main Ascent | Business Brokers & Advisors as well as an Advisory Partner in three family-owned enterprises. With over 20 years in global CPG, primarily with Colorado brands, Celestial Seasonings and Gaiam, Carolyn brings deep industry experience and business acumen to guide clients through transactions and growth strategies.



### Owen Nieberg

**Rocky Mountain Business Advisors, Senior Broker Advisor**

[Email](#) | [LinkedIn](#)

Over 30 years of M&A, operational management, and management consulting experience. Former consultant specializing in growth strategy, new business development, and operational improvements that increase revenue and profitability, leading to greater business valuations. Former COO of family business for 10 years, growing the company from 3 offices to eight, achieving a more than 3-fold increase in value, and eventually managing a successful 8-figure sale to a private equity firm. Earned both an MBA and a BBA at the University of Texas at Austin, graduating summa cum laude in both programs.

## Business Coach



### Michael Cushman

**The Futurist CEO, CEO**

[Email](#) | [LinkedIn](#)

Michael Cushman brings a fresh and valuable perspective to exit planning and business transitions. With a passion for helping today's businesses avoid becoming tomorrow's dinosaurs, Michael specializes in making exits more valuable by integrating future-readiness into strategic planning. He provides clear foresight and actionable strategies tailored specifically to each business, enhancing value at critical transition points.



# CHAPTER MEMBERS

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List organized by Advisor Type.

## Business Consultants



### Dan Bowdey, CEPA®

**Focal Point Business Coaching & Training, Principal Master Value & Transition Advisor**

[Email](#) | [LinkedIn](#)

Dan is a Value & Transition Advisor. Originally he was an inhouse Kaizen consultant at Kodak. He purchased two 7-figure businesses and sold at 8-figures. After consulting for 5 years, Dan switched to business coaching and exit planning. He helped business owners via his "No Regrets Business Transition Planning®" using Value Builder™ assessments & tools for the 3 legs of the stool and Focal Point curriculum to close gaps in Clarity, Growth, & Leadership.



### Jonathon Castner

**Castner Creative, Founder**

[Email](#) | [LinkedIn](#)

Jonathon is a strategic filmmaker based in Denver Colorado specializing in producing stories that inspire, engage and motivate the viewer, producing an emotional and intellectual connection. From script to screen, concept to creation, Jonathon builds a bridge between the client and their customers through deep research into both the company and the people who need them. The goal is revelation - to let that customer come into a new world where they are eager to do business with people who they now know, like and trust.



### Jen Eckhardt

**Entrepreneurial Freedom LLC, President**

[Email](#) | [LinkedIn](#)

Jen Eckhardt helps growing services / consulting firms scale beyond owner dependence, build strong teams, and plan (eventual) profitable exits. She brings seasoned expertise as an entrepreneur and former Fractional COO with two previous exits under her belt. She now mentors Founder CEOs and their Ops Leaders to lead scalable teams, optimize operations, and drive growth. Outside work, Jen is a wife, mom, and active community leader, committed to making a lasting impact.



### Adam Hill, CEPA®

**Extra Life Enterprises, Owner**

[Email](#) | [LinkedIn](#)

Adam Hill is a family business visionary, Professional EOS Implementer, certified exit planning advisor, international keynote speaker, and host of the Fearless Family Business Podcast. As the former CEO of his family's fourth-generation company, Adam led a transformation from near bankruptcy to nine-figure sustainability. Today, he equips family business owners and CEOs with proven frameworks to align leadership, strengthen governance, maximize value, and build generational freedom.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Business Consultants (cont'd)



### Sean Hutchinson, CEPA®

**Ready for Next, Partner**  
[Email](#) | [LinkedIn](#)

Sean Hutchinson is a partner at Ready for Next, helping U.S. and Canadian business owners increase enterprise value and achieve transition readiness. A CEPA® since 2008 and faculty member since 2014, he was honored as Exit Planner of the Year and inducted into the EPI Hall of Fame. Recognized as a top thought leader in exit planning, he holds a Master of Arts from Miami University of Ohio.



### Cynthia P. Martinez

**Renegade ThinkLab, Founder, Business & Marketing Strategist**  
[Email](#) | [LinkedIn](#)

Cynthia Martinez, founder of Renegade ThinkLab, brings over 25 years in architecture and commercial real estate to her role as business and marketing strategist. She partners with leadership to dive into clients' vision, culture, and processes—driving growth, increasing enterprise value, and ensuring businesses are primed for a smooth, successful exit.



### James Norton, CEPA®

**Fourteener Strategies, Managing Principal**  
[Email](#) | [LinkedIn](#)

James Norton is the Managing Principal of Fourteener Strategies, a Denver-based consultancy specializing in business strategy, fractional CFO services, and exit planning. He holds both the CEPA and CM&AA designations and brings deep experience in financial leadership and operational improvement. James serves on the board of the Mile High Chapter of the Association of Legal Administrators and is passionate about helping business owners build value and plan successful transitions.



### David Silverman, CEPA®

**The Alternative Board, Certified Business Coach**  
[Email](#) | [LinkedIn](#)

David Silverman, a Certified TAB Facilitator and CEPA®, coaches business owners and executives to achieve their visions beyond business. Through peer boards, one-on-one coaching, and exit planning, he helps clients grow value and plan meaningful transitions. A 40-year business owner and retired attorney, he draws from personal experience to guide others in building strong businesses and designing fulfilling next chapters in life.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Business Consultants (cont'd)



### David Wechsler, CEPA®

**Compass Group Ltd, Founder & Principal**

[Email](#) | [LinkedIn](#)

With over 40 years of business experience spanning several industry verticals, David brings a wealth of wisdom and valuable insights to his clients' businesses. With early tenures on Wall Street, Madison Avenue and Silicon Valley, he honed his diverse skills as a Senior Director, CEO and COO with several small to medium sized multi-unit businesses as well as publicly traded (NASDAQ) company. His has demonstrated success in leading organizations and management teams through initial start-up, transition, rapid growth and exit as a certified business coach & facilitator, CEPA, and M&A advisor (CM&AP).



### Mark Voss, CEPA®

**Vossmosis Business Brokerage, Founder**

[Email](#) | [LinkedIn](#)

Mark Voss, an entrepreneur for two decades, has built, bought, and sold multiple businesses. He served as marketing director for a national fast-food franchise and advised business owners across industries. Passionate about helping owners position their companies for sale, he focuses on marketing and finding the right buyer for a win-win deal. Mark is a Certified Exit Planning Advisor and a member of the International Business Brokers Association.

## Charitable Gifts



### Jeremy Stern

**Colorado Gifts Foundation, Major Gifts Officer**

[Email](#) | [LinkedIn](#)

With 20+ years in the nonprofit sector, Jeremy specializes in philanthropy, estate planning, donor relations, fundraising, event management, and community engagement. He is passionate about crafting customized donor plans that align with creating impact. His goal is to collaborate with you and your clients to simplify giving. Jeremy manages relationships with professional advisors at Colorado Gives Foundation, a community foundation dedicated to connecting people, ideas, and nonprofits.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## CPAs | Accountants | CFOs



### Sam Wigand, CEPA®

**Wigand Integrated Tax & Advisory, CEO**

[Email](#) | [LinkedIn](#)

Sam Wigand co-founded Wigand Integrated Tax & Advisory to align tax strategy with comprehensive wealth management. A former CPA at PwC and advisor at Merrill Lynch, he brings experience from both public and family-owned firms. Sam holds CPA, CFP®, and CEPA® credentials and is pursuing the CAIA UniFi. He's deeply committed to clients and community, serving on multiple nonprofit boards.

## Estate Planners



### Robert J. Lawton, Jr.

**Baird, Senior Estate Planner**

[Email](#) | [LinkedIn](#)

Rob is a Vice President and Senior Estate Planner at Baird's Private Wealth Management Group. A former estate planning attorney, he also worked in corporate roles leveraging his trusts and estates expertise. Based in Denver with his wife and three children, he enjoys running, hiking, skiing, gardening, and coaching soccer. Rob holds a B.A. from the University of St. Thomas and a law degree from Hamline University School of Law.

## Exit Planners & Value Advisors



### Brent Drever

**Exit Pathways, Managing Partner**

[Email](#) | [LinkedIn](#)

Brent's three decades in executive leadership and board governance make him an expert in business exit advisory. A co-founder of five companies and member of nine boards, he has guided businesses through sales, financial and strategic exits, and IPOs. His firsthand experience and advisory roles provide strategic insights that help business owners maximize exit value. Known for his calm and humble approach, Brent ensures smooth transitions and successful outcomes.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Exit Planners & Value Advisors (cont'd)



### Anthony Englert, CEPA®

**ALFA Advisory, Founder & Managing Director**

[Email](#) | [LinkedIn](#)

Anthony Englert has helped hundreds of entrepreneurs achieve the wealth they envision, advising founders ranging from \$1M all the way to \$100M and beyond. After 15 years with Goldman Sachs, Anthony founded ALFA Advisory to address the lack of strategic support for entrepreneurs before the “big exit”. From working each summer in his family’s business to working on Wall Street, Anthony learned wealth isn’t built – it’s designed, with clarity, intention, and expert advice. In addition to counseling private clients, he also leads a wealth-design mastermind. Anthony loves to travel, ski, and spend time with his wife, two sons, and two dogs.



### Brad Whitehead, CEPA®

**VX Strategy, Leadership Team Coaching**

[Email](#) | [LinkedIn](#)

Brad Whitehead is a management consultant, leadership coach, and exit planning advisor. As a Certified EOS® Implementer, he has helped 50+ organizations integrate EOS® to align vision, drive action, and ensure accountability. A Certified Exit Planning Advisor, he has worked across industries, including construction, professional services, and retail. With experience as a COO and private equity consultant, Brad holds degrees from Wake Forest and an MBA from Georgia Tech.

## Investment Bankers



### Scott Mitchell, CEPA®

**SDR Ventures, Managing Director**

[Email](#) | [LinkedIn](#)

Scott Mitchell is the Managing Director at SDR Ventures. Scott leads day-to-day business operations across all of SDR’s investment banking services. Scott’s responsibilities include closing transactions, leading the investment banking team, and business development. Scott has completed dozens of transactions at SDR across a wide variety of industries and with a personal focus on business-to-business services including technology-enabled services, field services, and industrial services.



### David Link

**Young America Capital, Managing Director, Rocky Mountain Region**

[Email](#) | [LinkedIn](#)

David Link has nearly three decades direct private equity investing and financial advisory experience. Currently serves as Co-Head of Consumer & Retail for Young America Capital. Mr. Link was was Founding Partner of Greenmont Capital Partners aka “The Boulder Organic Mafia”, a B-Certified investment partnership with \$65M under management that was focused broadly on the Whole Foods Channel. For business owners, he is skilled at building trust and helping determine the most sensible course of action in assessing exit options.



# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Mergers & Acquisitions Advisors



### Scott Casper

**Eight Quarter Advisors, Director**  
[Email](#) | [LinkedIn](#)

Scott brings an extensive background in Corporate Development and M&A dealmaking to the EQA team. Since his early days in Corporate Development at Dish Network, Scott has always had a penchant for identifying actionable opportunities and executing transactions. He enjoys the process and cumulative work required to get a deal done, and his focus has always been on taking the right action at the right time. Prior to joining EQA, Scott led numerous deal teams for various public and private companies, driving and completing accretive acquisitions and fortifying long-term business strategies.



### Christopher Mayer

**Business Transition Advisors, Sr. Vice President**  
[Email](#) | [LinkedIn](#)

Chris Mayer, CFA, is a Senior Vice President and M&A Specialist at Business Transition Advisors (BTA), where he leads complex financial modeling and transactional work with a primary focus on Employee Stock Ownership Plans (ESOPs). With a finance degree from the University of Wisconsin–Madison and advanced study at Otto Beisheim School of Management and the University of Leipzig, Germany, Chris brings a global perspective to his work.



### Scott Myatt

**Newman Creek Advisors, Founder & CEO**  
[Email](#) | [LinkedIn](#)

Scott Myatt founded Newman Creek Advisors to meet the growing demand for merger and acquisition support in lower middle market healthcare. He led vertical integration strategies at three distinct companies before joining an investment banking firm in Chicago. Scott holds a BA in Japanese from Brigham Young University, an MBA from CSU, and a Master of International Management from Thunderbird. He lives in Loveland, Colorado, and enjoys snowboarding, scuba diving, and mountain biking.

## Personal Planning Advisors



### Cindy Jennings

**Interwovenly, LLC, CEO & Founder**  
[Email](#) | [LinkedIn](#)

Cindy Jennings, creator of the LifeWise Business Exit™ program, helps business owners and executives design fulfilling post-exit plans. She guides entrepreneurs beyond the deal and executives beyond retirement, using a 10-year framework based on her expertise in strategic planning, change management, and executive coaching. Cindy also collaborates with wealth advisors and exit professionals to ease emotional friction, ensuring smoother transactions and successful transitions.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Revenue Operations / Sales Process



### Robert A. Lock

**Buffalo Mountain Sales Strategies, Founder & Outsourced Sales Leader**

[Email](#) | [LinkedIn](#)

Robert fixes broken sales machines for companies in the manufacturing, industrial, and distribution verticals. He partners with Exit Planners to grow revenue, company value, and bring owners to their desired exit. Utilizing his 25 years of experience in sales, sales leadership, and operations in manufacturing and distribution, he provides a path to both growth and freedom for his clients. Together, a customized Sales Engine is created for their business to drive long-term, sustainable revenue growth.



### Bill Poole

**Convergo, President**

[Email](#) | [LinkedIn](#)

Bill Poole has spent his career helping entrepreneurial businesses grow through smart, structured sales strategies. As the founder of Convergo, he works with business owners who need to elevate from sales involvement so they can lead more strategically and increase the value of their company.

Bill lives in Denver with his wife and their dog Beatrice, where they enjoy skiing, biking, live music, and spending time in the mountains.

## Valuation Professionals



### Zach Broyles

**Capitaliz, VP, Client Success & Analysis**

[Email](#) | [LinkedIn](#)

Zach Broyles has over 20 years of business experience, including leadership at startups, founding a tax credit advisory firm, and a decade of consulting. His work bridges finance, valuation, and strategic advisory. He holds a Master's in Finance and Risk Management, has completed the CVA exam, and is preparing to sit for the CEPA® exam.

## Wealth Managers & Financial Advisors



### Malcolm Aylett, CEPA®

**Edward Jones, Financial Advisor**

[Email](#) | [LinkedIn](#)

The focus of Malcolm's practice is on the sometimes complex needs of busy (frequently female) executives, business owners and entrepreneurs who need a financial partner to work with them on preparing for their retirement. His own experience with divorce also led to a focus on the needs of divorcees in his practice.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Wealth Managers & Financial Advisors (Cont'd)



### Michael Brady, CEPA®

**Generosity Wealth Management, Founder**

[Email](#) | [LinkedIn](#)

Michael Brady, is the founder of Generosity Wealth Management and The Generosity Group, based in Boulder, Colorado, with over 34 years of financial industry experience. He specializes in guiding business owners through wealth, estate, and exit planning, leveraging his Certified Exit Planning Advisor (CEPA) and Certified Value Growth Advisor (CVGA) credentials to align their wealth with purpose. Mike actively markets to attract business owners, offering tailored strategies for value-building and transitions, while engaging at a high level with consultants due to his advanced expertise.



### Marc Cimmino, CEPA®

**UBS Financial Services, Financial Advisor**

[Email](#) | [LinkedIn](#)

Marc Cimmino is a Senior Vice President and Financial Advisor who specializes in investment strategy, tax-efficient planning, and business exit strategies. In 2018, Marc joined a veteran advisory team from UBS in Norfolk, Virginia. Within the team, he leads efforts in investment management, tax strategy, and exit planning—working closely with clients' accountants, attorneys, and other professionals to deliver coordinated, comprehensive, and tax-efficient wealth plans. In 2022, Marc was selected to expand the team's presence in Denver, Colorado, to better serve clients across the western U.S.



### Kyle Ferrare

**Simon Quick Advisors, Managing Director**

[Email](#) | [LinkedIn](#)



### Molly Grasso

**Bernstein, Principal**

[Email](#) | [LinkedIn](#)

Molly Grasso, Principal at Bernstein Private Wealth Management in Denver, specializes in helping entrepreneurs and business owners with investment and planning complexities, including liquidity events, wealth transfer, philanthropy, tax planning, and asset allocation. She joined in 2015 and became an Advisor in 2019. Molly volunteers with the Denver Art Museum, Coors Western Art Show, and Florence Crittenton Services. She lives in Denver with her husband and two children.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Wealth Managers & Financial Advisors (Cont'd)



### Ted Hamstra

**William Blair Private Wealth Management, Managing Director**

[Email](#) | [LinkedIn](#)

With over 20 years of experience at Citigroup, Merrill Lynch, and William Blair, Ted serves as a key resource for business owners. He leverages the capabilities of the firm and his extensive network of professional experts to help solve the complex situations owners face today. He is well-versed in all stages of the wealth creation cycle, allowing him to engage in a wholistic conversation around investing, risk management, financial planning, tax and estate considerations, and family dynamics.



### Dustin Jeschke, CEPA®

**Wealth Strategies, Financial Advisor**

[Email](#) | [LinkedIn](#)

Working with Affluent households is guided by your priorities, with a focus on identifying “Black Swan” moments—those often-overlooked factors that can either accelerate your progress or quietly undermine your goals. As your advisor, Dustin’s role is to help you strengthen positive financial habits while addressing the obstacles that may be holding you back.



### Gary Keyfauver, CEPA®

**Raymond James, Wealth Management Advisor**

[Email](#) | [LinkedIn](#)

Gary works as a team with other advisors to help business owners move from thinking of their business as an income generator to building enterprise value. A big component of post-ownership planning is developing a purpose-driven, goals-oriented next phase plan and aligning the goals with cash flow requirements. By starting the planning process a couple of years ahead, business owners can better prepare for the transition personally, understand what they want in the sale or transfer, and better protect and maximize their business value.



### Jacob Miller

**Eagle Strategies, Financial Advisor**

[Email](#) | [LinkedIn](#)

Jacob Miller is a Financial Advisor based in Denver. After 12 years as a business owner and Professional Engineer, he successfully exited his firm to move to Denver and be with his wife. He uses that experience to help business owners align their personal and business finances through comprehensive planning, succession, and estate strategies.

# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Wealth Managers & Financial Advisors (Cont'd)



### Michael Mittman, CEPA®

**Auric Private Wealth, LLC, Co-Founder**

[Email](#) | [LinkedIn](#)

Michael co-founded Auric after advising UHNW families as a Senior VP at Merrill and a Citi Family Office Advisor. He began his investment career in 1998 and was recognized by the SEC as a whistleblower in a \$180M settlement. A Duke Economics grad, he holds the CFA®, CPWA®, CEPA®, and CDFA® designations. He serves on the board of Team G.E.A.R. and lives in Morrison, CO, with his wife and two kids. He enjoys hiking, skiing, marathons, and flying.



### Ryan Molloy, CEPA®

**RPM Wealth Management, President & Chief Investment Officer**

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Since 2012, Ryan has helped business owners and affluent families navigate wealth management complexities. Specializing in transitions like business sales, retirement, and inheritances, he creates tailored financial strategies. A Certified Exit Planning Advisor and Chartered Retirement Planning Counselor® (CRPC®), he maximizes business value and retirement success. Passionate about community service, he has supported the Boys & Girls Clubs and teaches financial literacy with Junior Achievement Colorado.



### Chase Moore, CFP, CDFA, CEPA®

**Baird, Wealth Manager**

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Believer. Family Man. Learner. Camping out at the intersection of wealth & purpose.



### Kevin Patterson, CFP®, CEPA®, CPWA®

**Motivus Wealth Management, Financial Advisor**

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Kevin Patterson, CFP®, CPWA®, CEPA®, is Co-Owner of Motivus Wealth Management in Colorado Springs. He specializes in advanced financial, tax, and exit-planning strategies for business owners, multi-generational families, and high-net-worth entrepreneurs, integrating succession, charitable, and legacy planning with his team to create cohesive, values-based wealth strategies.



# CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Denver area.  
List organized by Advisor Type.

## Wealth Managers & Financial Advisors



### Allen Pierce

**UBS Financial Services, Sr. Vice president - Wealth Management**

[Email](#) | [LinkedIn](#)

Allen began his career during a turbulent market period and has spent 18 years helping clients manage wealth through all conditions. He focuses on asset allocation and portfolio management, balancing risk and return. He assists with long-term strategies, tactical capital deployment, education funding, charitable giving, and estate planning. A FINRA-registered advisor, he holds Series 3, 7, and 66 licenses. Based in Denver, he's an avid outdoorsman and active in several philanthropic organizations.



### Scott Ranby, CFP®, CEPA®, CPA, MBA

**Mission Wealth, Wealth Advisor**

[Email](#) | [LinkedIn](#)

As a Wealth Advisor, Scott helps clients achieve their financial goals through personalized strategies in investment management, retirement planning, tax optimization, and estate planning. He enjoys partnering with business owners to navigate the personal and financial aspects of exiting their business—a transition that often involves parting with their life's work. His goal is to help them plan thoughtfully and proactively so they can move forward with clarity, purpose, and peace of mind.



### John Suarez, CEPA®

**Peristyle Private Wealth, President & Founder**

[Email](#) | [LinkedIn](#)

As an avid car enthusiast, John founded Peristyle to serve UHNW car collectors and scalars of private companies manage significant liquidity events. Peristyle, as the Ferrari Club of America's Exclusive Wealth Management Partner, is particularly adept at identify and mitigate risks in investment markets and beyond to help ensure enduring legacies.



### Dale Warner, CEPA®

**Merrill Lynch, Financial Advisor**

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Dale and the Law & Associates Group leverage Merrill's global resources to provide comprehensive wealth management services. With 15+ years as an operations executive and co-founder in Colorado, Dale has worked with angel investors, private equity, and non-dilutive capital to drive growth. He uses his expertise to help business owners build valuable companies, strengthen financial plans, and align personal goals with potential business sales.

# CHAPTER MEMBERS

Michael Abbate

Betsee Gotwald

Matthew Allen

Jared Johnson

Marti Awad

Stephanie Johnson

Matt Danaher

Brien Mattingly

Justin Davis

Steven Nuccio

Roger Dael

Richard Palmersmith

Keith Eckhardt

Julie Pressnell

Morgan Endicott

Anthony Satriano

Matthew Woolbright

For questions about this Member Directory or general inquiries about the Denver EPI Chapter, please contact Jo Melzer.

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