TRUSTED ADVISOR DIRECTORY

Exit Planning Institute®

Mahoning-Shenango Valley Chapter

An official chapter of the Exit Planning Institute®

FALL 2026 ISSUE

A Thank You from the President of the EPI Mahoning-Shenango Valley

On behalf of the Mahoning-Shenango Valley Chapter of the Exit Planning Institute, thank you for being an active and supportive part of our business succession and transition planning community. Your engagement is what will enable our chapter to thrive, and we are grateful for the time, energy, and expertise you bring to this group.

With the release of our 2026 Mahoning-Shenango Valley Chapter directory, we are proud to reflect on a year of growth and momentum. During this year, our chapter welcomed almost 20 members (as of August) – not bad, but only half-way to our goal of 40 members! The strength of our community, and value for the members and the local economy will be built by continued growth and engagement of the professionals in our area dedicated to helping our business-owner clients succeed in planning and executing successful transitions. Thank you for being early adopters of the vision and mission of the Chapter! We now need you to evangelize the message and mission to others.

At the heart of our work is a shared mission: to support business owners through one of the most significant transitions they will face in their lives. Your commitment to the Exit Planning Institute's vision – through your expertise, participation in events, and thoughtful collaboration – has helped bring that mission to life in the Mahoning/Trumbull/Columbiana counties and Shenango Valley region.

This directory is more than a list of names; it reflects the collective talent, experience, and commitment within our chapter. It serves as a tool to strengthen connections, encourage collaboration, and build trusted teams that guide business owners through the exit planning process with confidence. We encourage you to engage with your fellow members.

As we continue our growth, we remain deeply committed to creating meaningful opportunities for learning, networking, and professional development. We are incredibly thankful to each member who has contributed to our success this year and helped shape the chapter into what it is today.

Thank you for being an integral part of this journey. Together, we are helping shape the future of the business community in our region – one successful transition at a time.

Warm regards,
Louis Colella

ABOUT OUR CHAPTER

Our Mission

The Mahoning-Shenango Valley Chapter of the Exit Planning Institute brings together trusted professional advisors who are committed to helping business owners build, grow, and transition significant companies.

Through collaboration, education, and shared best practices, our chapter connects business owners with advisors who understand that successful exit planning is about more than a transaction—it is about creating value, strengthening the business, preparing for the future, and aligning the company's success with the owner's personal and financial goals.

Our advisor directory highlights professionals who share this commitment and bring specialized expertise, perspective, and a collaborative approach to helping business owners achieve their goals.

Our Goals

Connect Business Owners with Trusted Advisors

Provide business owners with access to a network of experienced professionals who can help address the financial, operational, strategic, legal, personal, and other considerations involved in building and transitioning a successful business.

Promote Value Creation and Transferability

Encourage business owners to focus on building companies that are valuable, sustainable, efficient, and transferable—whether they plan to exit today, in five years, or have no immediate plans to leave.

Educate and Prepare Business Owners

Increase awareness of exit planning and provide educational opportunities that help owners better understand the steps, strategies, and resources needed to prepare for a successful transition.

Foster Collaboration Among Advisors

Create a forum where professional advisors can collaborate across disciplines, share knowledge, and work together to address the unique needs of business owners throughout the Mahoning-Shenango Valley region.

Champion Best Practices

Encourage the adoption of proven exit planning principles, best practices, and the Value Acceleration Methodology™ to help advisors deliver greater value to the business owners they serve.

Build a Stronger Local Business Community

Promote the long-term health and success of privately held businesses in our region by helping owners create companies that are resilient, valuable, transferable, and positioned for continued success.

BOARD LEADERSHIP

Kevin Asti, Founding Member

Certified EOS Implementer®, EOS Worldwide

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kevin.asti@eosworldwide.com

Kevin Asti is a Certified EOS Implementer® with more than 30 years of manufacturing leadership experience, including roles as VP of Operations, General Manager, and President. His passion for EOS grew from seeing its impact firsthand and experiencing how the system transformed a business. Today, Kevin draws on that experience to help business owners and leadership teams build stronger organizations, improve profitability, and gain greater clarity and control as they grow.

Scott Couchenour, Founding Member

4th Quarter Life Coach, Serving Strong Enterprises

linkedin.com/in/scottcouchenour/
coach@servingstrong.com

Scott Couchenour brings 27 years of executive leadership experience in a multi-million-dollar family business, along with firsthand experience navigating career transition and reinvention. As a member of the EPI Mahoning-Shenango Valley Chapter Board, Scott is committed to strengthening the local business community. He draws on his leadership experience and own career journey to help executives plan intentionally, navigate transitions, and build meaningful next chapters.

BOARD LEADERSHIP

Lou Colella, CPA/PFS, CFP®, CEPA®, Founding Member

Partner | Managing Director, Business Growth & Transitions Team | Wealth Advisor, JFS Wealth Advisors
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lcolella@jfswa.com

Lou Colella brings more than 40 years of experience helping entrepreneurs and business owners build, manage, and transition their wealth. As Managing Director of JFS Wealth Advisors' Business Growth & Transitions Team, Lou specializes in wealth planning, business growth, and succession planning. His firsthand experience working with privately held businesses gives him a practical understanding of the challenges owners face and a passion for helping them turn years of hard work into lasting value and successful transitions.

Brian Coulter, Esq., Founding Member

Shareholder, Roetzel & Andress
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Bcoulter@ralaw.com

Brian Coulter is a business counselor, trial lawyer, and shareholder with Roetzel & Andress, bringing legal and business insight to companies navigating growth, risk, and transition. He regularly advises small and middle-market businesses on growth and exit planning, including mergers and acquisitions. As a board member of the EPI Mahoning–Shenango Valley Chapter, Brian brings strategic perspective, practical guidance, and a strong commitment to strengthening the local business community.

BOARD LEADERSHIP

Jereme Frey, Founding Member

Director, Confluence Advisors, LLC
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Jereme Frey of Confluence Advisors, LLC specializes in helping family- and founder-owned companies navigate the sale of their businesses. With a background in finance and business strategy, Jereme brings an analytical and strategic perspective to helping business owners prepare for what's next. As a member of the EPI Mahoning–Shenango Valley Chapter, he contributes valuable insight and expertise to business owners and the broader chapter community.

Sean Gibbon, CPA/PFS, CFP®, CEPA®, Founding Member

Wealth Advisor, JFS Wealth Advisors
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sgibbon@jfswa.com

Sean Gibbon is a Wealth Advisor with JFS Wealth Advisors' Business Growth & Transitions Team, helping entrepreneurs and business owners navigate growth, wealth management, and transition planning. As President of the Pittsburgh Exit Planning Institute chapter, Sean brings deep expertise in privately held businesses and a strong commitment to strengthening the professional community through education and collaboration.

BOARD LEADERSHIP

Bill Vennetti, CPA, Founding Member

Partner, Packer Thomas

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wvennetti@packerthomas.com

Bill Vennetti brings more than 30 years of experience helping individuals and businesses navigate accounting, tax planning, and financial management. As the owner of his Canfield-based accounting practice, Bill provides practical, relationship-driven guidance to the businesses and families he serves. As a board member, he brings financial expertise, integrity, and a collaborative perspective to the EPI Mahoning-Shenango Valley Chapter.

Dan Zugell, ChFC®, AEP®, Founding Member

Executive Vice President, Business Transition Advisors

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dzugell@bta.us.com

Dan Zugell serves as Executive Vice President at Business Transition Advisors, Inc., specializing in succession and liquidity planning, particularly Employee Stock Ownership Plans (ESOPs). With decades of financial services experience, Dan brings specialized expertise in valuation, transition strategy, and business succession. As a board member, he helps strengthen the EPI Mahoning-Shenango Valley Chapter through education and collaboration focused on helping business owners plan for successful transitions.

GET TO KNOW OUR MEMBERS

Meet Our Team

Lou Colella

JFS Wealth Advisors
Comprehensive Financial Planning & Wealth Management, with a focus on business owners and succession/transition planning

You might have something in common if you like...
Fly Fishing • Golf • Hunting • Food • Cigars & Spirits • Jazz • Fitness

Ask Lou about:
Connecting People • Getting Things Done • Bringing a Vision to Reality

He's been there:
Mountain Trail Hiking • International Travel • Fly Fishing & Tying

Fun fact:
Lou has a lot of interests.

"So many other interests."

Scott Couchenour

Serving Strong Enterprises
Personal Planning for business owners facing a business transition

You might have something in common if you like...
Really Good Coffee • Fly Fishing • Guitar • Piano

Ask Scott about:
Spreadsheets • Organizing Chaos • Turning Vision Into Reality

He's been there:
Skydiving • Scuba Diving off Jamaica • Bankruptcy

Fun fact:
He's a coffee connoisseur who knows his way around pour-overs, siphons, V60s and more.

Sean Gibbon

JFS Wealth Advisors
Aligning personal and business financial goals so you can live your best life

You might have something in common if you like...
Mountains • Nature • Good Food • Being Active

Ask Sean about:
Solving Puzzles • Making Connections • Building a Fire

He's been there:
Mountain Hiking • Scuba Diving in Maui • Triathlons

Fun fact:
Sean has an uncanny ability to discover that you and he already have a mutual acquaintance.

GET TO KNOW OUR MEMBERS

Ryan Glinn

Tolmiros Financial
Challenging business owners and CFOs to align their money with their values

You might have something in common if you like...
Fly Fishing • Fly Tying • Basketball • Poker • Live Music

Ask Ryan about:
Honest Conversations • Tax & Estate Planning • Investment Management

He's been there:
Shark Fishing • Brook Trout Fishing in Canada • A Forrest Frank Concert

Fun fact:
He ties his own flies.

Jereme Frey

Confluence Advisors, LLC
Sale of family and founder-owned companies with more than $2M of EBITDA

You might have something in common if you like...
Physical Fitness • Hiking • Travel • Technology • Entrepreneurship

Ask Jereme about:
• Personal Finance • Business Strategy • Excel

He's been there:
32 states • 12 National Parks • Sprint Triathlon • Ragnar Race

Fun fact:
He apparently spends way too much time in Excel.

Brandon Sklenar

Packer Thomas
Accounting Services — Tax, Audit & Client Accounting Services

You might have something in common if you like...
Baseball • Fishing • Traveling • Running

Ask Brandon about:
Networking • CRM Setup • Mentoring

He's been there:
Hawaii • The Marine Corps Marathon • A World Series

Fun fact:
He won a World Series.

Yes, we need to find out the story behind this one.

Dan Zugell

Business Transition Advisors, Inc.
Employee Stock Ownership Plans (ESOP)

You might have something in common if you like...
Disc Golf • Music • Vintage Beer Cans • Cards

Ask Dan about:
Connecting People • Praying for People

He's been there:
Summer Camp Counselor • Mailman • Almost a Music Major

Fun fact:
Dan started college as a music major. He lasted one week.

Apparently, one needs to read music to be a music major.

OUR MEMBERS

John Cournan, CPA (Member Since January 2026)

Principal, Packer Thomas
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jcournan@packerthomas.com

John Cournan is a Principal at Packer Thomas with more than 37 years of experience in public accounting. He works with businesses in manufacturing, metals, and distribution, specializing in transactions, succession planning, and ESOPs. John brings a practical, strategic perspective to business transitions and enjoys helping owners navigate big decisions with confidence.

Ralph DoVidio, CPA (Member Since January 2026)

Senior Manager at Packer Thomas
rdovidio@packerthomas.com
https://www.linkedin.com/in/ralph-dovidio/

Ralph DoVidio joined Packer Thomas in 2025 and brings experience in audit, assurance, and business consulting. He works with businesses and organizations across industries including oil and gas, manufacturing, professional services, and nonprofits. Ralph enjoys helping business owners better understand their numbers, strengthen their processes, and make confident decisions.

OUR MEMBERS

Ryan Glinn, MBA, CFP®, CLTC, NSSA®, CEPA® (Member Since March 2026)

Co-Founder and Managing Partner, Tolmiros Financial
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ryan@liveboldly.pro

Ryan Glinn is a Financial Advisor at Tolmiros Financial who helps individuals, families, and business owners plan confidently for what's next. His work focuses on financial planning, retirement, wealth management, and business transitions. Ryan brings a collaborative approach to helping clients connect their personal goals with their long-term business and exit plans.

Brad Forrider, CEPA® (Member Since February 2026)

Senior Financial Advisor at GYG Financial]
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b.forrider@lpl.com

Brad Forrider is a Senior Financial Advisor with GYG Financial, bringing more than two decades of experience in the financial services industry. He works with individuals, families, and business owners to bring together the many pieces of their financial picture and develop thoughtful, tailored solutions. Brad is known for his integrity, discipline, and commitment to building lasting client relationships.

OUR MEMBERS

Trevor Harnett, CIMA®
(Member Since December 2025)

Founder and Mangaging Partner, Methodica Capital
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trevor@methodicacapital.com

Trevor Harnett is the founder of Methodica Capital, a private equity firm focused on family-owned and founder-led businesses across Northeast Ohio and Western Pennsylvania. With more than 20 years of experience as an investor, entrepreneur, and business owner, Trevor brings firsthand insight into growing and transitioning businesses. He's especially passionate about creating value while helping founders plan for what comes next.

Brian Laraway, MBA, CEPA®, CPFA®, CLTC®
(Member Since Feburary 2026)

Managing Partner/VP/Wealth Manager at Bury Financial Group
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brian@buryfinancial.com

Brian Laraway has been in the financial industry since 2002, bringing a personal perspective to the importance of good financial guidance. After learning an early lesson from a $3,000 investment that lost more than 95% of its value,
Brian became passionate about education, communication, and long-term planning. A longtime Mahoning Valley community member, he also enjoys giving back through organizations like Austintown Rotary.

OUR MEMBERS

Zachary Politsky, CVA (Member Since Feburary 2026)

Senior Manager at HBK CPAs and Consultants
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zpolitsky@hbkvg.com

Zachary Politsky is a Senior Manager with HBK Valuation Group, specializing in business valuations for privately held and family-owned businesses and professional practices. He helps owners understand what drives business value and plan for succession, estate planning, and eventual exit. Zachary enjoys making complex valuation concepts easier to understand and helping owners make informed decisions about their next chapter.

Austin Sambuco, CFP®, CEPA® (Member Since January 2026)

Wealth Advisor at JFS
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asambuco@jfswa.com

Austin Sambuco is a Wealth Advisor on JFS Wealth Advisors' Business Growth & Transitions Team, where he helps business owners plan for both the present and what comes next. His work focuses on investment management, estate planning, and exit strategies. Austin is also passionate about his community and the next generation of professionals, serving as Vice President of the Mahoning Valley Young Professionals.

To learn more about becoming a member, please visit /exit-planning-institute.org/chapter/epi-mahoning-shenango-valley-chapter.

OUR MEMBERS

Brandon Sklenar
(Member Since January 2026)
Business Development Manager - CAS, Packer Thomas
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bsklenar@packerthomas.com

Brandon Sklenar is a Business Development Manager for Client Accounting Services at Packer Thomas, helping businesses simplify accounting through outsourced bookkeeping, reporting, and advisory services. He enjoys helping organizations streamline operations, make smarter decisions, and focus on growth. Outside of work, Brandon is passionate about connecting young professionals and currently serves as President of the Mahoning Valley Young Professionals.

WHY MEMBERSHIP MATTERS

67% of association members say networking with others in their field is a top reason they join.

Source: 2024 Membership Marketing Benchmarking Report

At EPI Mahoning-Shenango Valley, we believe the right connections can lead to new ideas, stronger businesses, and lasting relationships.

UPCOMING EVENTS
at Mahoning-Shenango Valley

SEPTEMBER 2026

Choosing a Business Exit Strategy: 8 Ways to Monetize Your Business
Date: Thursday, September 24, 2026
Time: 4:00–6:00 p.m. ET
Location: Avalon at Squaw Creek – Casanova Room, Vienna, OH
Cost: $40 | Free for Members

Explore the eight primary exit strategies available to business owners and learn how to evaluate the options based on your financial goals, business priorities, and vision for the future. Earn 2 Value Acceleration Knowledge Hours.

OCTOBER 2026

Operating Without the Owners: Building a Scalable Business
Date: Thursday, October 22, 2026
Time: 4:00–6:00 p.m. ET
Location: Avalon at Squaw Creek Ballroom, Vienna, OH
Cost: $40 | Free for Members

Learn how to build a strong management team and document the systems your business needs to operate independently of its owners. Discover practical strategies to create a scalable organization that increases efficiency, reduces owner dependency, and builds long-term business value. Earn 2 Value Acceleration Knowledge Hours.

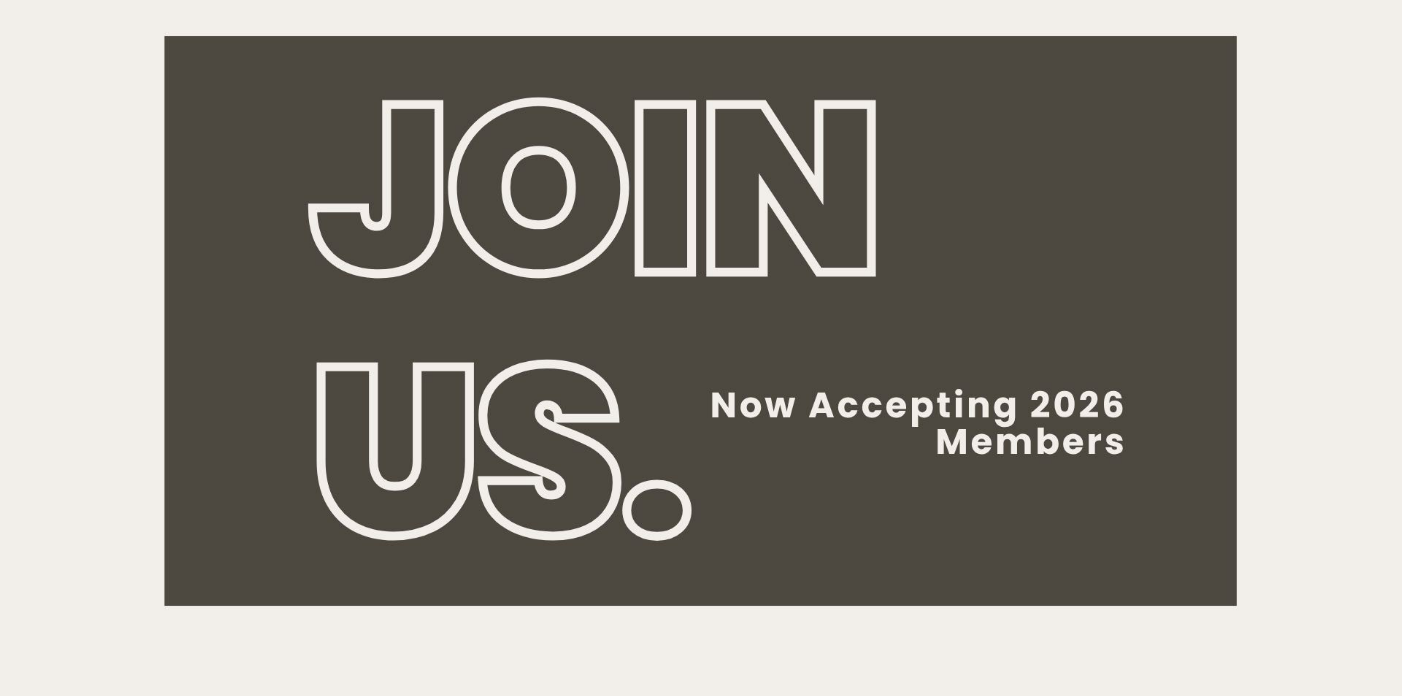
DECEMBER 2026

Mahoning-Shenango Valley Members Holiday Celebration
Date: Wednesday, December 16, 2026
Time: 4:00–6:00 p.m. ET
Location: DoubleTree Downtown Youngstown – Windows on the Square Lounge, Youngstown, OH
Cost: Free for Members

Celebrate the season with fellow Mahoning-Shenango Valley EPI Chapter members at our annual holiday networking social. Connect with local exit planning professionals, strengthen your relationships, and renew your 2027 chapter membership to stay engaged throughout the coming year. Earn 2 Value Acceleration Knowledge Hours.

For more event details and times visit exit-planning-institute.org/events.
***Note, all chapter events and their dates and times are subject to change.**

BECOME A MEMBER



Why Join EPI Mahoning-Shenango Valley?

The EPI Mahoning-Shenango Valley Chapter brings together local advisors who are committed to helping business owners grow, transition, and exit successfully. Membership gives you the opportunity to connect with professionals across disciplines, share expertise, strengthen referral relationships, and learn from others working in the exit planning space.

As a member, you'll have opportunities to:

- **Build relationships** with trusted local advisors
- **Expand your knowledge** through educational programs and collaboration
- **Share best practices** and strengthen your professional expertise
- **Develop meaningful referral** and business opportunities
- **Help business owners** become better prepared for their next chapter
- **Contribute** to a stronger, more connected local business community

Note: Membership demonstrates your commitment to your craft and to serving as a trusted advisor.

For additional information on how to join, please email Alicia Umbel at aumbel@jfswa.com.

EVENT SPONSORSHIP

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linkedin.com/company/epi-mahoning-shenango-valley-chapter

exit-planning-institute.org/chapter/epi-mahoning-shenango-valley-chapter