EPI SARASOTA | 2026

MEMBER DIRECTORY

Meet Our Community of Advisors and Chapter Leaders

EPI Exit Planning Institute®
Sarasota

Sarasota

Letter From Our President

ADAM KAZALSKI

Dear Members and Friends,

It is my pleasure to welcome you to the Sarasota Chapter of the Exit Planning Institute.

We officially launched in March of 2025, and while we may be a new chapter, we're building on a strong foundation rooted in collaboration, curiosity, and a shared commitment to helping business owners prepare for and achieve successful transitions.

The EPI Sarasota Chapter was formed to bring together local advisors from a variety of disciplines—financial, legal, accounting, M&A, coaching, and beyond—who believe in the power of a team-based approach to exit planning. Our goal is to provide a professional community where members can learn from one another, build stronger referral relationships, and stay at the forefront of value acceleration and owner readiness strategies.

Whether you're a seasoned CEPA or new to the field, there's a place for you here. Our chapter programming is designed to be practical, relevant, and engaging, with a focus on real-life case studies, actionable insights, and peer-to-peer dialogue. More than that, we're working to create a welcoming space where members feel connected and supported.

Whether you're here to sharpen your skills, grow your network, or better serve your clients, we're glad to have you with us. Thanks for being part of our inaugural year. We're just getting started, and I look forward to the journey ahead.

Adam Kazalski
Founder & *Managing Partner,*
FourFront Wealth Management

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EPI Sarasota Chapter President

Adam Kazalski, ChFC, CEPA

FourFront Wealth Management, Founder & Managing Partner
adam.kazalski@fourfront.com | LinkedIn

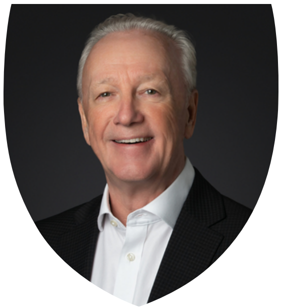
Adam has been helping families, professionals, and business owners navigate investment and economic decisions since 1997. As founder of FourFront Wealth Management and creator of the Navigation for Wealth™ system, he combines 30 years of experience with a personalized, macroeconomic approach to financial planning. In 2022, he transitioned to the independent RIA space to serve clients as a fiduciary.

EPI Sarasota Board Member

Brent Campbell, CFP, CEPA

Edward Jones, Financial Advisor
brent.campbell@edwardjones.com | LinkedIn

Brent is passionate about empowering individuals, families, and business owners to achieve their unique financial goals. He endeavors to learn what clients value most, delving into their personal story, helping articulate a vision for the future and addressing concerns that undermine confidence in financial security.



EPI Sarasota Board Member

Tony Dempsey, CEPA

Sunstate Business Brokers, Owner / Broker
tony@sbbrokers.com | LinkedIn

Tony is a leading M&A advisor on Florida’s Gulf Coast, bringing 40 years of executive and ownership experience to his work with local business owners. As a CEPA, he helps clients maximize value through strategic planning, often years ahead of a sale. Known for his expertise in business analytics and market insight, Tony guides owners through smooth, successful transitions.

EPI Sarasota Board Member

Joel Vause

AssetMark, Inc., Regional Consultant
joel.vause@assetmark.com | LinkedIn

Joel has been with AssetMark since 2014 in various roles after a five=year career with JP Morgan Chase. In his role, Joel is dedicated to making a difference in the lives of clients through working directly with financial advisors. HIs role is to educate, advise, and consult with advisors, while building relationships, identifying their needs, and helping them grow their businesses.

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Dana Watkins, CEPA

Due North Enterprises, Chief Executive Officer
dana@duenorthenterprises.com | LinkedIn

As CEO of Due North Enterprises and a Certified Exit Planning Advisor (CEPA), Dana helps business owners grow, prepare, and exit their companies on their own terms. With a background in M&A and over $1B in global acquisitions, she builds customized exit strategies that increase business value and support smooth, confident transitions.

CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Sarasota area.

Marla Bace

Marla Bace Coaching, Owner, Certified Executive Coach
Email | LinkedIn

Marla is a business and leadership coach who helps high-achieving professionals and business owners gain clarity, confidence, and strategy to move forward. She draws on decades of experience leading teams and driving results.

Troy Barnett, MBA, CEPA

Mercedes Medical, COO
Email | LinkedIn

Troy has 16 years of experience in accounting, business process consulting, and software implementation with a background that includes controller and international accounting manager. Troy's focus is on improving business systems and accounting processes to support growth and efficiency.

Steve Beebe

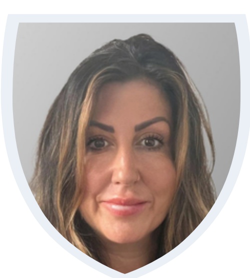
Hallmark Brokers, Broker Associate
Email | LinkedIn

Steve began his career in the automotive industry where he quickly discovered that he loved to take on challenges and provide customers with a first-class experience they couldn't get anywhere else. After moving to Florida, Steve joined the Hallmark team. He loves being active in the local community and networking with the amazing people in the Gulf Coast region of Florida.

Alex Bethune, CFP, CEPA

Money Planning, LLC, Founder & Senior Financial Advisor
Email | LinkedIn

Alex works with young professionals who are making career moves, starting families, launching businesses, or juggling financial responsibilities for the first time. They don't just want investment advice—they want an honest partnership to help them align their money with the life they're building.



Maria Bizzaro

ADP, Director, Private Equity
Email | LinkedIn

With over 20 years in global enterprise sales, Maria partners with C-suite leaders to tackle complex challenges like M&A transformations and scaling for growth. Whether working with private equity firms after acquisitions or supporting long-term plans, she brings a consultative, results-focused approach.

Kristin Carlson, CEPA

K&D Lake Country Team LLC, Certified Master Business & Executive Coach
Email | LinkedIn

Kristin brings 30+ years of corporate leadership and a lifelong team sports background to her coaching. She builds high-performing teams through servant leadership and helps leaders reach their full potential. Since 2018, she's worked with business owners and executives to improve performance, accelerate growth, and lead with purpose.

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William Chase, CPA, CFP

HBKS Wealth Advisors, Senior Financial Advisor Email

Will Chase is a senior financial advisor at HBKS® Wealth Advisors in Sarasota with over a decade of experience in public accounting and financial planning. A CPA and CFP®, he helps individuals and businesses build strategies to meet long-term financial goals.

Chad Choate, AAMS, CEPA

Edward Jones, Financial Advisor
Email | LinkedIn

As a financial advisor, I want to find out what's important to you and help you build personalized strategies to achieve your goals. My driving force is to change people's lives in a positive way, and what better place than my home of Manatee County to do that.

Katie Close

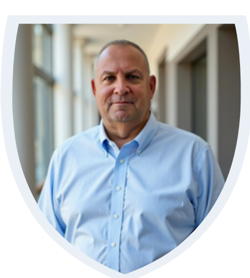
Self Mastery LLC, Founder, Coach, Speaker
Email | LinkedIn

Katie is an experienced Life Coach with a demonstrated history of upgrading small business owners' emotional intelligence, self-awareness, and interpersonal skills.

Tina Corner Stolz, CEPA

Founder, LXCouncil
Email | LinkedIn

Tina is a best-selling Forbes author, dedicated to helping professionals build and run successful peer advisory groups. Creator of the Mastermind Academy certification and host of the podcast, she empowers advisors with innovative tools, training, and community support to launch thriving peer groups that deliver lasting impact and significant income growth for business owners. As a CEPA, Tina co-leads the EPI Accelerator Program.



Shawn Dunahue, CSL

Tidewater Solutions Group, Founder & President
Email | LinkedIn

Shawn is an entrepreneur and sales leader with a track record of driving growth for $25M–$800M companies. He builds high-performing teams, aligns strategy with execution, and helps businesses optimize revenue and expand in competitive markets.

Christopher Fehr, CPA, CEPA

Freedom Financial Wealth & Tax, Founder
Email | LinkedIn

Chris is a nationally recognized financial educator, author, and tax specialist featured on NBC, ABC, CBS, and FOX. Founder of Freedom Financial Wealth & Tax, he has helped clients reduce taxes and build lasting wealth since 1994.

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Atticus Frank, CFA, ABV

HBK Valuation, Regional Director
Email | LinkedIn

Based in Sarasota, Atticus specializes in valuations for tax, transactions, and litigation, and works closely with multi-generational family businesses. He's also a frequent speaker on business valuation topics and is extensively involved in the community.

Danielle Gates, CFP, CEPA

D. Gates Wealth Management, CEO, Financial Advisor
Email | LinkedIn

For over 25 years, Danielle has helped professionals and families build clarity and confidence in their financial lives. A CFP®, she leads D. Gates Wealth Management and is committed to being a lifelong resource for each client.

Gwen Griggs, JD, CEPA

Co-Founder, ADVOS Legal & The Deal ADVantage
Email | LinkedIn

Gwen has years of M&A experience, having represented buyers and sellers, built companies, and led strategy from the C-suite. She's seen firsthand how strong businesses lose value when founders aren't prepared for a transaction. She founded The Deal ADVantage to help prepare founders early so they can maximize value, avoid common pitfalls, and choose what comes next on their terms.

Chad Gross

Woodstone Brokerage, Real Estate Agent & Business Broker
Email | LinkedIn

Chad brings over 20 years of business and entrepreneurial experience to his work in M&A and commercial real estate. A former hospitality founder and current real estate investor, he helps clients navigate property sales, leases, acquisitions, and exits.

Jason Hughes, CEPA, CFP, CPWA

RBC Wealth Management, Senior VP

Jason provides individualized service and wealth management solutions that instill clarity and confidence. His clients are supported by a tool set and business model that has made RBC one of the world's strongest global financial institutions.

Carla Johnson, CFA, CEPA

Raymond James, Financial Advisor
Email | LinkedIn

Carla develops tailored investment and financial planning strategies to help clients achieve their long-term goals. She takes a holistic approach—learning about each client's career, lifestyle, philanthropic interests, and wealth planning needs—to deliver thoughtful, personalized advice rooted in trust and collaboration.

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Use the information below to connect and collaborate with local industry experts in the Sarasota area.

Daniel Keck, CEPA

FocusCFO, Area President
Email | LinkedIn

Dan brings 30+ years of experience in executive leadership, sales leadership, strategic planning, global commerce, and day-to-day operations. His experience includes organization-wide engagement in sales, finance, operations, and manufacturing processes. Dan's approach is guided through motivating, empowering, servant leadership, and developing teams to deliver organizational success.

Chris Kehoe, CFA, CEPA

RW Roge & Company, Wealth Advisor and Director of Investment Research
Email | LinkedIn

Chris manages high-net-worth portfolios while leading his firm’s investment research efforts. He develops customized investment strategies aligned with clients’ goals and risk tolerance, supported by thoughtful financial planning oversees research and market outlooks, translating insights into clear, actionable strategies.

Jeffrey Lewis

Bonadio, Partner
Email | LinkedIn

With almost 30 years of experience, Jeff assists business owners in exiting their businesses and advises clients on all aspects of buy-side and sell-side M&A transactions. Jeff enjoys helping clients meet their goals and firmly believes that simply being helpful to clients and prospects produces the best long-term returns.

R. Nolan Lewis, CFP

FourFront Wealth Management, Advisor & Certified Financial Planner
Email | LinkedIn

Nolan became a financial advisor to combine two passions: building genuine relationships and helping people feel confident about their money. Inspired by personal family experiences, he focuses on guiding clients through life’s big transitions with trust, care, and a plan that reflects their values, not just their numbers.

Kyle Lonsinger, CFP, CIMA

Accurate Advisory Group, Wealth Advisor Email | LinkedIn

Kyle is a third-generation financial advisor driven by a personal understanding of what it means to be a trusted partner. Since 2016, he’s helped individuals and families build strong financial futures.

Brian Mariash, CIMA, AAMS

UBS, Financial Advisor
Email | LinkedIn

Brian left a career in education to join the securities industry in 2001 and later founded Mariash Lowther Wealth Management. His personal mission to educate, connect, and contribute has become the mission of the team. Brian was named to Forbes “Best-In-State Wealth Advisors” list for six consecutive years.

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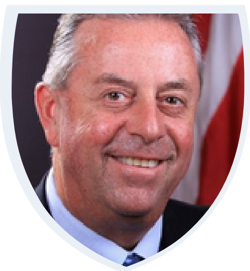


Tim Meinhardt, CEPA

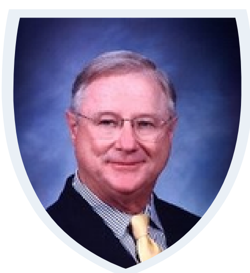
Atruity, Fractional COO, Owner & Founder
Email | LinkedIn

As someone fortunate enough to build and exit a fast-growing company, Tim knows the reward of getting it right at the finish line. He empowers businesses to gain a mindset on business value and accelerate their growth to thrive with precision and confidence.

Lori Moen, CEPA

Catalyst Group ECR, Founder
Email | LinkedIn

Lori offers over 35 years of both life experience as a business owner and training in the fields of corporate sales and sales management. She has worked in both the corporate world and in sales management, and now seeks to offer others the opportunity to share her coaching tools with business owners who are interested in working on their business, not just in their business.



John Nelson

Nelson Consulting, President & Owner
Email | LinkedIn

John spent three decades in the computer industry, where he led companies through capitalization, public offerings, acquisitions, and mergers. In 2000, he founded Nelson Consulting to bring that same expertise to mid-market business owners.

Mike Norton

CSG Partners, Director
Email | LinkedIn

An investment banking veteran with hands-on experience in family business operations and management consulting, Mike appreciates the unique needs of closely held businesses and their trusted advisors. Mike joined CSG after more than a decade working on underwriting, structuring, and raising capital for transactions over $3 billion in value.

Colleen O'Connell, CEPA

WAIQ, Co-Founder & President
Email | LinkedIn

Colleen has 15+ years of experience driving operational change for high-growth companies across industries. As co-founder of WAIQ, she helps businesses streamline processes to boost efficiency and increase valuation at exit.

Jennifer O'Dell, CLTC, CEPA

Morgan Stanley, Financial Advisor
Email | LinkedIn

As a founding member of The Wellington Group at Morgan Stanley, Jennifer helps clients navigate financial, insurance, and business exit planning with strategies tailored to their goals, from retirement and legacy planning to long-term care and transitions.

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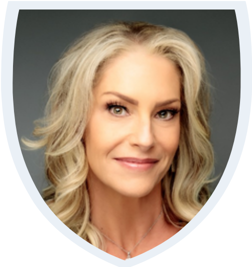

Jennifer O'Dell, CLTC, CEPA

Morgan Stanley, Financial Advisor
Email | LinkedIn

As a founding member of The Wellington Group at Morgan Stanley, Jennifer helps clients navigate financial, insurance, and business exit planning with strategies tailored to their goals, from retirement and legacy planning to long-term care and transitions.

C. Ryan Quinty, CFP, CEPA, CPWA, WFA

Cyndeo Wealth Partners, VP Financial Planning
Email | LinkedIn

Ryan helps middle-market business owners align business success with personal financial goals. His focus is on optimizing business value, preparing for transitions, and creating long-term financial security. He brings deep experience in wealth management, exit planning, and value acceleration, delivering strategies that drive growth and reduce owner dependency.

Ryan Rupert, CFP, CEPA

Morgan Stanley, Senior Portfolio Manager
Email | LinkedIn

With over a decade of wealth management experience, Ryan helps his clients preserve, grow, and distribute what they've spent their life working towards. He believes custom financial plans and focused portfolios are the most effective means of achieving his clients' specific life goals.

Steven Sadowski, CEPA

Sunstate Business Brokers, Sales Associate
Email

Steve joined Sunstate Business Brokers in 2024, bringing 15+ years of finance and M&A experience to help clients buy or sell businesses. His background as a Financial Analyst to CFO gives him insight to guide deals and maximize value.

Hugh Sawyer, CPA, CGMA, PFS, MS

Rework Capital, Partner
Email | LinkedIn

High is a highly accomplished visionary executive with extensive experience in tax/financial planning and management, operations management, human resources, and strategic planning with both startup and world-class growth organizations.

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Tyson Schoeff

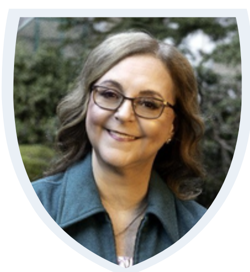
Auris, Business Consultant
Email | LinkedIn

Tyson has 35+ years in business consulting, allowing him to bring a valued consultative approach to clients. His goal is to help companies reduce overall cost, streamline processes, minimize liability and gain a competitive edge by attracting and retaining quality employees.

Michael Shea, P.A., CEPA

Transworld Business Advisors, Senior Partner
Email | LinkedIn

Mike leads Transworld's Central Florida office and has built a top reputation, closing over 400 deals and over $1 billion in business sales since 2005.



Ellin Sidell, PMP, ACC

The Sidell Method, CEO
Email | LinkedIn

Ellin is CEO of The Sidell Method, a boutique firm helping leaders master influence, boost performance, and build stronger teams. With decades in Fortune 500 companies, she blends behavioral science with coaching to drive lasting impact.

David Spisak

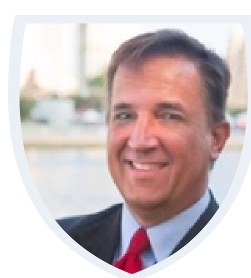
Leaders Advisory Council, Founder & Executive Director
Email | LinkedIn

With 30 years in logistics, healthcare, and startups, and 20 years in the C-suite, David began leading Peer Advisory Groups in 2014. Inspired by their impact, he's since expanded his work to support more business owners and leaders.

Robert Stadler, CEPA

Northern Trust, Vice President and Senior Banking Advisor
Email | LinkedIn

Robert is VP and Senior Banking Advisor at Northern Trust, leading commercial and private banking in Sarasota. With 22 years of experience, he supports individuals, families, and businesses with banking and wealth management needs. He is a member of the Argus Foundation.



Brian Stephens, MBA, CEPA

Legacy Venture Group, M&A Advisor
Email | LinkedIn

Brian has a strong passion for helping legacy business owners navigate the complex process of selling their businesses, transferring their businesses to family members, or even passing their businesses on to their employees. He has a strong history of helping construction-related companies, as well as medical and dental practices.

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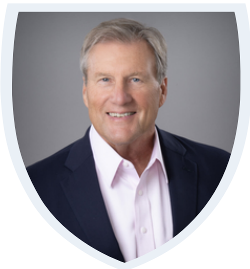


Doug Sullivan, CEPA, CCIM, CBI

SEPA Florida, M&A Advisor, Business Broker, Commercial Realtor

Email | LinkedIn

Doug has a wealth of expertise, with a keen sense of strategy and a track record of success. He is Cofounder and CEO of Stonewood Holdings and grew the company to $57M revenue and 1,200 employees. He raised $20M+ in capital and loans and is now a top West Coast Florida Business Intermediary.

Jonathan Tubbs

Congdon & Co, Director of Concierge Services

Email | LinkedIn

After 16 years in the securities industry, Jonathan saw the risks of disjointed advice. He now focuses on a family office model—integrating advisors to deliver holistic, coordinated guidance that truly serves the client's full financial picture.

Eric Vogt, CEPA

Lazear Capital, Managing Director, Tampa Market Leader

Email | LinkedIn

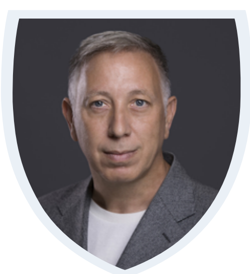
With over 35 years of experience in commercial banking, Eric brings deep expertise in M&A financing and the entrepreneurial insight gained from founding—and later selling—his own business. Drawing on both perspectives, he helps business owners plan and execute transitions that preserve value and position their companies for continued success.

Steven Weldon, MBA, CPA

Viking CFO Founder & CEO

Email | LinkedIn

Steven has over 20 years of experience as a CFO, advisor, and tax professional. His style of financial advising is candid and focused on growth. The accounting world has earned a reputation of being boring and stuffy, but his approach is warm, approachable, and reliable.



Mike Zappone

EOS Worldwide, Professional EOS Implementer

Email | LinkedIn

With over 30 years of experience, Mike has built and grown successful ventures in transportation, restaurants, auto dealerships, and retail. His track record and business acumen have earned him a reputation for turning ideas into thriving enterprises.

SPONSORS

FourFront Wealth Management

FourFront Wealth Management is a holistic wealth planner with a sophisticated client base that demands robust offerings and complex financial planning. Our process is sound, and relationship based. Never transactional and always transparent.

Over nearly a quarter of a century, we have found that a team approach is an effective method to help clients with a wide variety of needs maneuver through a complex financial world.

No one strategy fits everyone, which is why every client gets our undivided attention, from planning to execution to follow-up. We take a proactive approach to helping clients develop a strategy to address their financial goals and objectives, using the most efficient methods available.

AssetMark

AssetMark is a leading provider of extensive wealth management and technology solutions that help financial advisors meet the ever-changing needs of their clients and businesses. AssetMark, together with its affiliates AssetMark Trust Company, Voyant, and Adhesion Wealth Advisor Solutions, serves advisors at every stage of their journey with flexible, purpose-built solutions that champion client engagement and drive efficiency. Its ecosystem of solutions equips advisors with services and capabilities to help deliver better investor outcomes by enhancing their productivity, profitability, and client satisfaction.

No matter where you are in your journey, AssetMark is ready to provide customized, end-to-end asset management solutions for your practice.

SouthState Bank

For decades, our bankers have been trusted advocates, helping customers achieve personal and business goals. At SouthState we offer innovative banking solutions to support individuals, businesses, and communities throughout their financial journey, with the expertise and tools needed to move forward.

Our Company was founded on the principles of providing innovative, personalized banking services for all, making our communities a better place to live, and supporting our knowledgeable, experienced bankers. Decades later, we are still taking measurable steps to continue these initiatives.

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