EPI DENVER | JUNE 2026

MEMBER DIRECTORY

Meet Our Community of Advisors and Chapter Leaders

Exit Planning Institute®
Denver Chapter

Exit Planning Institute®
Denver Chapter

Letter From Our President

Dear Denver EPI Chapter Members,

As I reflect on the growth of our chapter, I continue to be reminded that the true strength of the Denver EPI community isn't found in our events, our credentials, or even our collective expertise — it's found in the relationships we build with one another.

Over the past year, we've seen our chapter become one of the most active and engaged EPI communities in the country. That success is a direct result of members who consistently show up, share generously, and invest in helping each other better serve business owners.

This directory is one of the most valuable tools we have to strengthen those connections. Behind every listing is a professional who has committed to the Value Acceleration methodology and who understands the power of collaboration in creating better outcomes for privately held business owners.

As we continue to evolve, we're placing an even greater emphasis on peer-to-peer engagement. Our new peer share discussions, inspired by successful chapters across the EPI network, have already demonstrated the value of creating space for candid conversations, shared experiences, and practical insights. These deeper connections are helping us move beyond networking and toward true community.

I encourage you to use this directory intentionally. Reach out to someone you've never met. Schedule a coffee. Explore opportunities to collaborate. The relationships you build within this chapter often become some of the most rewarding and impactful in your professional journey.

Thank you for your continued commitment to our mission, to one another, and to the business owners we serve.
I look forward to seeing what we accomplish together in the months ahead.

Sincerely,

Wally

Jason "Wally" Waldron
Founder & President, Exitology

BOARD MEMBERS

Denver Chapter

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®, CFA®

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. Shina 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.

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Denver Chapter

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 Member

Bob Lee, CFP®, AEP®, CEPA®

Mariner, Senior Wealth Advisor

Email | LinkedIn

Bob 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. Bob'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 MEMBERS

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.

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MARINER

WHY MARINER?

Values
The Mariner team interacts with clients and colleagues by exemplifying our values of Excellence, Caring, Belonging, Abundance, Keep Promises, Loyalty and Optimism.

Community Impact
The Mariner Foundation started in 2009 with a mission to improve lives by educating, creating, bridging and equipping individuals and organizations with tools and opportunities. Since its inception, the foundation has awarded more than $7.8 million to over 1,100 organizations.

Services
We deliver a client-first experience through our **One Mariner Approach**: wealth planning, estate planning and trust services, nstitutional services, tax planning and specialty tax services, investment IQ, investment banking and insurance solutions.

Business owners choose Mariner when they:
- Are unsure how much they need to "net" from the sale of their busines
- Feel like they are not receiving proactive ideas to reduce their income taxes
- Are frustrated by having to try to coordinate the advice of various advisors
- Don't have a vision for what life will look like after they exit their business
- Are unsure how they will continue to "get paid" after they sell their business

Access is everything. That's why Mariner advisors have access to a team of support for wealth planning, investment advisory, estate, tax, insurance, and more. Together, we find sophisticated solutions to complex wealth challenges.

For more information visit: www.mariner.com

UBS
Thompson, Singor & Cimmino

At the core of the Thompson, Singor & Cimmino wealth management practice is a team of highly credentialed, tenured professionals dedicated to serving our clients. Client relationships are paramount to us, and we prioritize addressing every aspect that matters to them. Drawing on the extensive resources of UBS, we create bespoke financial plans to empower them to confidently realize their goals, lower their taxes, and advance their philanthropic efforts. We do not fit them into our box but build one around them. Amid life's complexities, we stand as steadfast partners, creating calm and anticipating needs to fortify their financial future. Through our proactive service model our clients always know when their next scheduled meeting is, this provides a continuous stream of advice and insights to navigate the ever-evolving complexities of life.

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

Exit Planning Institute®
Denver Chapter

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.

Michael Dolan

Polsinelli, Shareholder | M&A Attorney
Email | LinkedIn

Michael Dolan is an attorney whose practice focuses on mergers, acquisitions, divestitures, and majority and minority recapitalizations.
Mike has helped dozens of business owners sell or recapitalize their companies. In those transactions, Mike typically works with the business owner's network of advisors to help evaluate options, navigate the sale process, and execute transactions in a way that aligns with the owner's business and personal goals.

Bill Peffer

Taft LLP | Partner
Email | LinkedIn

Bill Peffer is a Partner at Taft and chairs Taft's Mountain West Business group, leading 40+ attorneys across eight offices. Bill is a deal jockey who helps business owners successfully navigate mergers and acquisitions, corporate financings, and general corporate matters by bringing a pragmatic, practical, and closing-focused approach to each transaction. Bill is honored to currently serve on the Board of Directors of MENTOR Colorado and the Biennial of the Americas.

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.

CHAPTER MEMBERS

Exit Planning Institute® Denver Chapter

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

Business Brokers (cont'd)

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.

Business Consultant

Laura Baker

CyberWyoming, Executive Director & Cybersecurity Business Counselor

Email | LinkedIn

Laura Baker is the Co-Founder and Executive Director of CyberWyoming, where she leads statewide initiatives to help average citizens, microbusinesses, and organizations understand and manage their cybersecurity risks. As the Executive Director of CyberWyoming, she oversees programs that promote cybersecurity awareness, workforce development, and community resilience. Her work includes managing the Cybersecurity Competition for Small Businesses (aka Made Safe Cybersecurity Business Training Program), advancing practical cybersecurity education for Wyoming's business community, and developing workforce pathways through tech and business advisor cybersecurity apprenticeship programs.

CHAPTER MEMBERS

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

Business Consultant (cont'd)

Dan Bowdey, CEPA®

Focal Point Business Coaching & Training, Principal Master Value & Transition Advisor
Email | LinkedIn

Dan is a Value & Transition Advisor and former Kaizen consultant at Kodak. He acquired two 7-figure businesses and exited both at 8-figures. After 5 years in consulting, he transitioned into business coaching and exit planning. Through his "No Regrets Business Transition Planning®" program, Dan uses Value Builder™ assessments and Focal Point Coaching curriculum to help owners close gaps in Clarity, Effectiveness, Growth, Sales, and 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.

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.

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.

CHAPTER MEMBERS

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

Business Consultant (cont'd)

TJ Kern

Timberline Business Advisors, Founder & Managing Member
Email | LinkedIn

TJ Kern is a 40-year veteran of commercial banking and has worked with hundreds of small businesses and their owners across the Front Range of Colorado. TJ continues this important work through Timberline Business Advisors, which he launched in March 2025 to provide fractional CFO, exit planning, and M&A advisory services to businesses with annual revenues of $25MM or less. TJ's banking career included 15 years of cash flow lending and senior debt to PE firms acquiring SMBs across various industries. This experience allows TJ to look at small businesses through the lens of both a lender and a buyer, which brings significant value to his clients.

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 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).

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

Jay Forester

Kurtz Fargo, Director, State and Local Tax

Email | LinkedIn

Jay Forester is a Tax Director at Kurtz Fargo and specializes in state and local tax (SALT), with more than 13 years of experience advising clients on complex multistate tax matters. He focuses on multi-state tax consulting, with deep expertise in indirect tax, including sales and use tax compliance, process improvement, and automation. He has worked extensively with clients in the software, construction, manufacturing and distribution, and consumer goods industries, bringing a practical, business-oriented approach to solving complex tax challenges.

Carter Freeman

vcfo, Vice President, Western Region

Email | LinkedIn

Carter's life long career in financial management and accounting has provided a great opportunity to help Denver, Boulder and other Colorado based businesses achieve success. He particularly enjoys assisting business owners work toward financial abundance through proactive forward thinking and resolving issues. Specialties include Capital formation, Forecasting and planning, Key performance measurement, Financial reporting and analysis, Merger and acquisition strategies.

Tim McCormack

RubinBrown, Partner

Email | LinkedIn

Tim McCormack is a Partner in RubinBrown's Private Equity Services Group with more than 10 years of experience serving clients. He provides transaction due diligence assistance to clients in the technology, manufacturing and distribution, services, hospitality, private equity and healthcare industries.

He previously conducted public company audits and other assurance-related services for clients primarily in the software, telecommunication and consumer goods industries. Tim has been involved in due diligence engagements with an aggregate deal value in excess of $8 billion. Tim currently specializes in middle and lower-middle market transactions.

Sam Wigand, CEPA®, CFP®, CPA®

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.

CHAPTER MEMBERS

Exit Planning Institute® Denver Chapter

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List organized by Advisor Type.

Digital Marketing & Asset Protection

Paige Wiese

Tree Ring Digital, CEO
Email | LinkedIn

Paige Wiese is Founder & CEO of Tree Ring Digital, a Denver-based digital agency specializing in M&A digital infrastructure. She created the Digital Continuity System™ and Digital Asset Protection™ to help businesses protect, transfer, and increase the value of their digital assets through transactions. Tree Ring Digital serves 2,000+ clients nationally with website development, digital marketing, and transaction-focused services.

ESOP Advisor

Andrew Fejer

Lazear Capital, Managing Director
Email | LinkedIn

Andrew Fejer is a Managing Director at Lazear Capital, leading the Mountain States for ESOP originations and extending his expertise to business owners nationwide. With more than 20 years of experience in private credit, and commercial and corporate banking, he helps privately held companies access capital, manage growth, and plan for complex ownership transitions.
Throughout his career with BOK Financial, Lafayette Square, HSBC, and JPMorgan Chase, Andrew has developed a deep understanding of the financial, operational, and strategic challenges business owners face. His experience across diverse industries positions him as a trusted advisor to companies throughout Colorado and the broader Rocky Mountain region.

Lincoln Franke, CEPA®

Blue Ridge Associates, Regional Sales Director
Email | LinkedIn

Lincoln focuses on partnering with advisors to assist them better serving their business owner client's retirement plans and selling their business through an ESOP.
Whether the goal is optimizing retirement plans, reducing taxes, catching up on retirement savings, improving employee retention, or maximizing the net proceeds from the sale of a business utilizing the benefits of an ESOP, Lincoln has been the partner of choice for financial advisors and their clients for 34 years.

EPI DENVER CHAPTER | JUNE 2026

CHAPTER MEMBERS

Exit Planning Institute®
Denver Chapter

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Exit Planners & Value Advisors

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

Kristy Marshall

SDR Ventures, Sr. Manager of Partnerships and Business Development

Email | LinkedIn

Kristy works at the intersection of founders, advisors, and strategic capital with a focus on building meaningful relationships with the professionals who serve business owners — wealth managers, CPAs, attorneys, and trusted advisors — and helping connect them to the insights and resources their clients need as their businesses grow and evolve. With a background that spans wealth management, entrepreneurship, and corporate strategy. As a former business owner who successfully exited, Kristy understands firsthand the emotional weight and financial complexity of navigating inflection points.

Pierce Schell

GLC Advisors, Associate

Email | LinkedIn

Pierce Schell joined GLC Advisors as an Associate in 2025. Prior to GLC, Pierce was an associate at Littlejohn Capital where he supported portfolio operations and add-on transactions. Prior to Littlejohn, Pierce worked for RBC Capital Markets and Forvis LLP working on sell-side and buy-side M&A for middle-market companies.

William “Bill” Thode

SDR Ventures, Senior Advisor

Email | LinkedIn

Bill is an investment banker and attorney with 28 years of experience successfully advising business owners in a variety of M&A transactions, primarily on the sell side. He is the Managing Director at Charter Commercial Investment Group, LLC, and a Senior Advisor for SDR Ventures, LLC. He is a Certified Business Intermediary, Certified Mergers & Acquisitions Advisor, and holds a Series 79, 82 and 63.

CHAPTER MEMBERS

Exit Planning Institute®
Denver Chapter

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.

Revenue Operations / Sales Process

Robert A. Lock, CEPA®

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.

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®, CVGA®

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.

Stephanie Johnson, CEPA®

Edward Jones, Financial Advisor
Email | LinkedIn

Stephanie is committed to supporting overscheduled business owners with competing financial goals so that they have the confidence to retire in the comfort they have dreamt. Her clients receive regular check-in on goal progress to prevent competing goals from derailing them from their plans. She strategically aligns her appointments to focus on all areas of your financial plan and will partner with your trusted team of professional professionals, including accountants and attorneys, to create a holistic approach to your financial path.

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.

CHAPTER MEMBERS

Exit Planning Institute®
Denver Chapter

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)

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, CEPA®

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.

Michael Mittman, CEPA®, CFA®, CPWA®, CDFA®

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.

CHAPTER MEMBERS

Exit Planning Institute®
Denver Chapter

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)

Chase Moore, CFP®, CDFA®, CEPA®

Baird, Wealth Manager
Email | LinkedIn

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

Allen Pierce, CEPA®

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.

Dale Warner, CEPA®

Merrill Lynch, Financial Advisor
Email | LinkedIn

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

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)

Dane Winter, CPA®, CFP®, CEPA®

Sindrich & Associates, Partner, Financial Advisor
Email | LinkedIn

Dane helps business owners build real wealth by integrating business strategy, tax planning, and personal financial planning into one cohesive plan. As a CPA, CFP®, and CEPA®, and a business owner, Dane works at the intersection of growth, risk management, and exit planning—starting day one, not at the finish line. His approach centers the business as the primary wealth-building asset, helping owners increase profitability, maximize value, and plan for life beyond the business on their terms.

Dana Albright

Matt Allen

Alexandra Black-Paulick

Matt Danaher

Morgan Endicott

Evan Faber

Angela Falcini

Craig Garrison

Mark Jamison

Jeremy Laufer

Jordan Maly

Chris Rice

Anastasia Toomey

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

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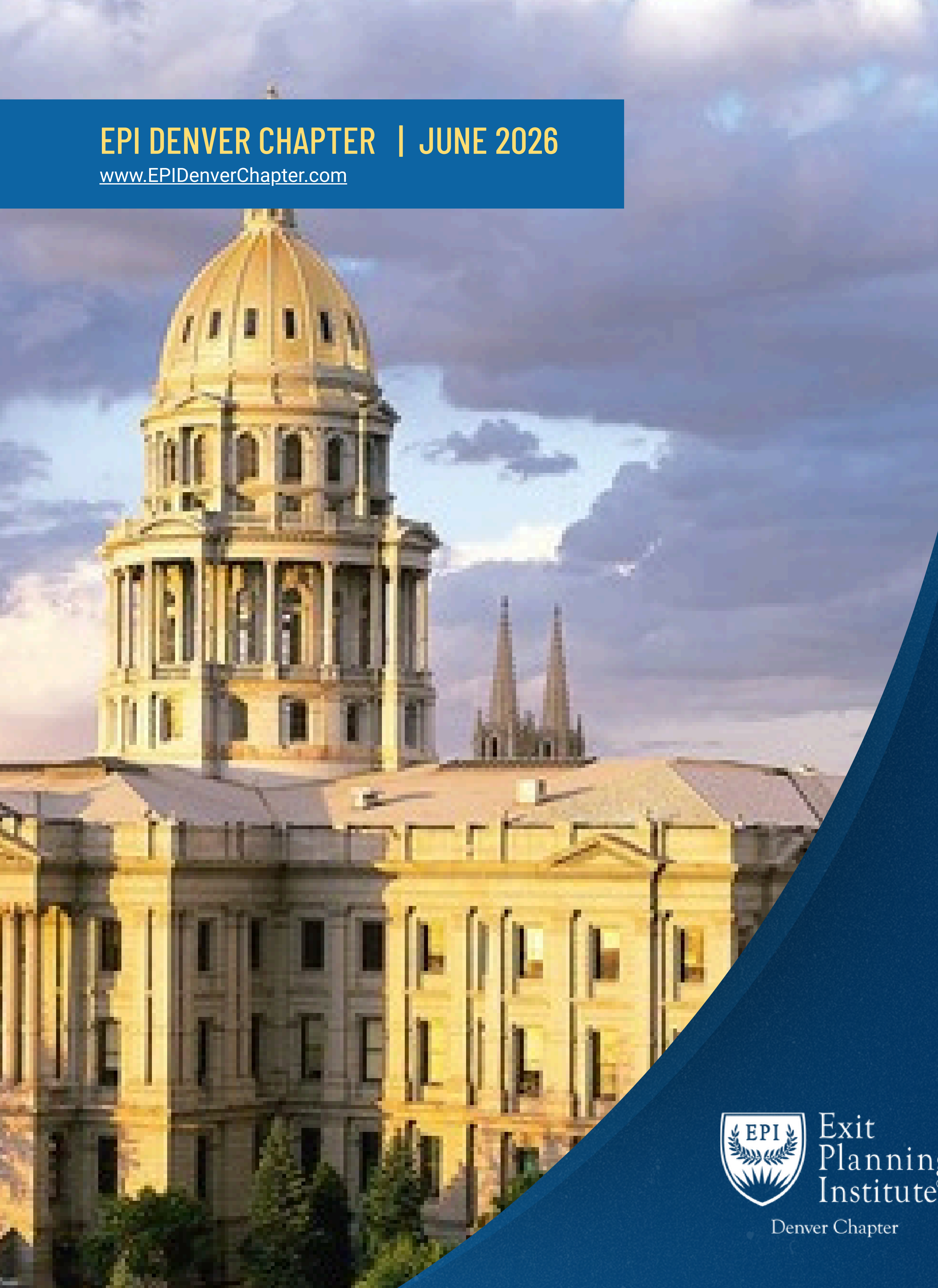

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