EPI DENVER CHAPTER

Member Directory

Meet Our Community Of Advisors And Chapter Leaders

Exit Planning Institute®

Denver Chapter

BOARD MEMBERS

Jason “Wally” Waldron, CEPA®, Chapter President

Founder and CEO, Exitology
Email: wally@exitology.com
Web: https://exitology.com/
EPI Member Since: 2022

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.

Steven Blazek, Vice President

Managing Director, Private Wealth Advisor BMO Private Bank
Email: steven.blazek@bmo.com
Web: https://uswealth.bmo.com/
EPI Member Since: 2024

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.

Benjamin Bender, CEPA®, Board Member

Partner & Wealth Advisor, Carson Wealth
Email: bbender@carsonwealth.com
Web: https://www.carsonwealth.com/
EPI Member Since: 2022

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.

Shina Culberson, CEPA®, Board Member

President, Quist Valuation
Email: culberson@quistvaluation.com
Web: https://quistvaluation.com
EPI Member Since: 2020

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. Quist offers a diverse portfolio of products and services from estimates of value through software tools to certified valuations that meet the highest scrutiny for tax, financial reporting or litigation purposes. Over its 40 years in business, Quist has honed its approach to meet the client where they are along their business owner journey.

Gary Curran, Board Member

Managing Director - M&A, Corporate Finance Associates Worldwide
Email: garycurran@cfaomaha.com
Web: https://www.cfaw.com/omaha-ne
EPI Member Since: 2017

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.

George Helock, Board Member

Managing Director, LCG Advisors
Email: ghelock@lcgadvisors.com
Web: https://lcgadvisors.com
EPI Member Since: 2023

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.

Steven Kohnke, Board Member

Value Growth Advisor, Denver Business Coach
Email: steven@denverbusinesscoach.com
Web: https://denverbusinesscoach.com
EPI Member Since: 2022

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.

Rachel Kramarchuk, CEPA®, Board Member

Partner & Wealth Advisor, Carson Wealth
Email: rkramarchuk@carsonwealth.com
Web: https://www.carsonwealth.com
EPI Member Since: 2022

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.

Robert Lee, Board Member

Senior Wealth Advisor, Mariner
Email: robert.lee@mariner.com
Web: https://www.marinerwealthadvisors.com/our-team/bob-lee/
EPI Member Since: 2022

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.

David Silverman, CEPA®, Board Member

Certified Business Coach, The Alternative Board
Email: david@tabdenverwest.com
Web: https://www.thealternativeboard.com/
EPI Member Since: 2022

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.

THANK YOU 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.

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.

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.

CHAPTER DIRECTORY

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

BUSINESS BROKERS

Carolyn Ryan, MBA

Founding Partner, Main Ascent | Business Brokers & Advisors
Email: carolyn@mainascent.com
Web: https://mainascent.com
EPI Member Since: 2024

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.

BUSINESS CONSULTANTS

Dan Bowdey, CEPA®

Principal Master Value & Transition Advisor, CEPA, CVB, Focal Point Business Coaching & Training
Email: dbowdey@focalpointcoaching.com
Web: www.focalpointcoaching.com
EPI Member Since: 2021

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.

Jen Eckhardt

President, Entrepreneurial Freedom, LLC
Email: jen@entrepreneurialfreedom.com
Web: https://www.entrepreneurialfreedom.com
EPI Member Since: 2024

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.

Sean Hutchinson, CEPA®

Partner, Ready for Next
Email: sean@readyfornext.com
Web: https://readyfornext.com
EPI Member Since: 2008

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.

Mark Voss, CEPA®

Founder, Vossmosis Business Brokerage
Email: mark@vossmosis.com
Web: https://vossmosis.com
EPI Member Since: 2023

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

Major Gifts Officer, Colorado Gives Foundation
Email: jstern@coloradogivesfoundation.org
Web: www.coloradogivesfoundation.org
EPI Sponsor Since: 2024

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.

CPAS / ACCOUNTANTS / CFOS

Sam Wigand, CEPA®

CEO, Wigand Integrated Tax & Advisory
Email: sam.wigand@wita.tax
Web: www.wita.tax
EPI Member Since: 2022

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.

Senior Estate Planner, Baird
Email: rlawton@rwbaird.com
Web: https://www.rwbaird.com
EPI Member Since: 2025

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 AND VALUE ADVISORS

Brent Drever

Managing Partner, Exit Pathways
Email: brent@exitpathways.com
Web: https://exitpathways.com
EPI Member Since: 2020

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.

Brad Whitehead, CEPA®

Leadership Team Coaching, VX Strategy
Email: brad.whitehead@vxstrategy.com
Web: https://www.vxstrategy.com/
EPI Member Since: 2024

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.

MERGERS AND ACQUISITIONS ADVISOR

Scott Myatt

Founder and CEO, Newman Creek Advisors
Email: scott@newmancreekadvisors.com
Web:www.newmancreekadvisors.com
EPI Member Since: 2020

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

CEO & Founder, Interwovenly, LLC
Email: cindy@interwovenly.com
Web: https://www.interwovenly.com
EPI Member Since: 2024

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.

WEALTH MANAGERS AND FINANCIAL ADVISORS

Molly Grasso

Principal, Bernstein
Email: molly.grasso@bernstein.com
Web: https://www.bernstein.com
EPI Member Since: 2025

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.

Ryan Molloy, CEPA®

President & Chief Investment Officer, RPM Wealth Management
Email: ryan@rpmwealthmgmt.com
Web: https://www.rpmwealthmgmt.com
EPI Member Since: 2025

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.

Allen Pierce

Senior Vice President - Wealth Management, UBS Financial Services
Email: allen.pierce@ubs.com
Web: https://advisors.ubs.com/allen.pierce/
EPI Member Since: 2020

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.

Dale Warner, CEPA®

Financial Advisor, Merrill Lynch
Email: dale.warner@ml.com
Web: https://advisor.ml.com/sites/co/colorado-sprng/law-and-associates
EPI Member Since: 2024

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.

REVENUE OPERATIONS/ SALES PROCESS

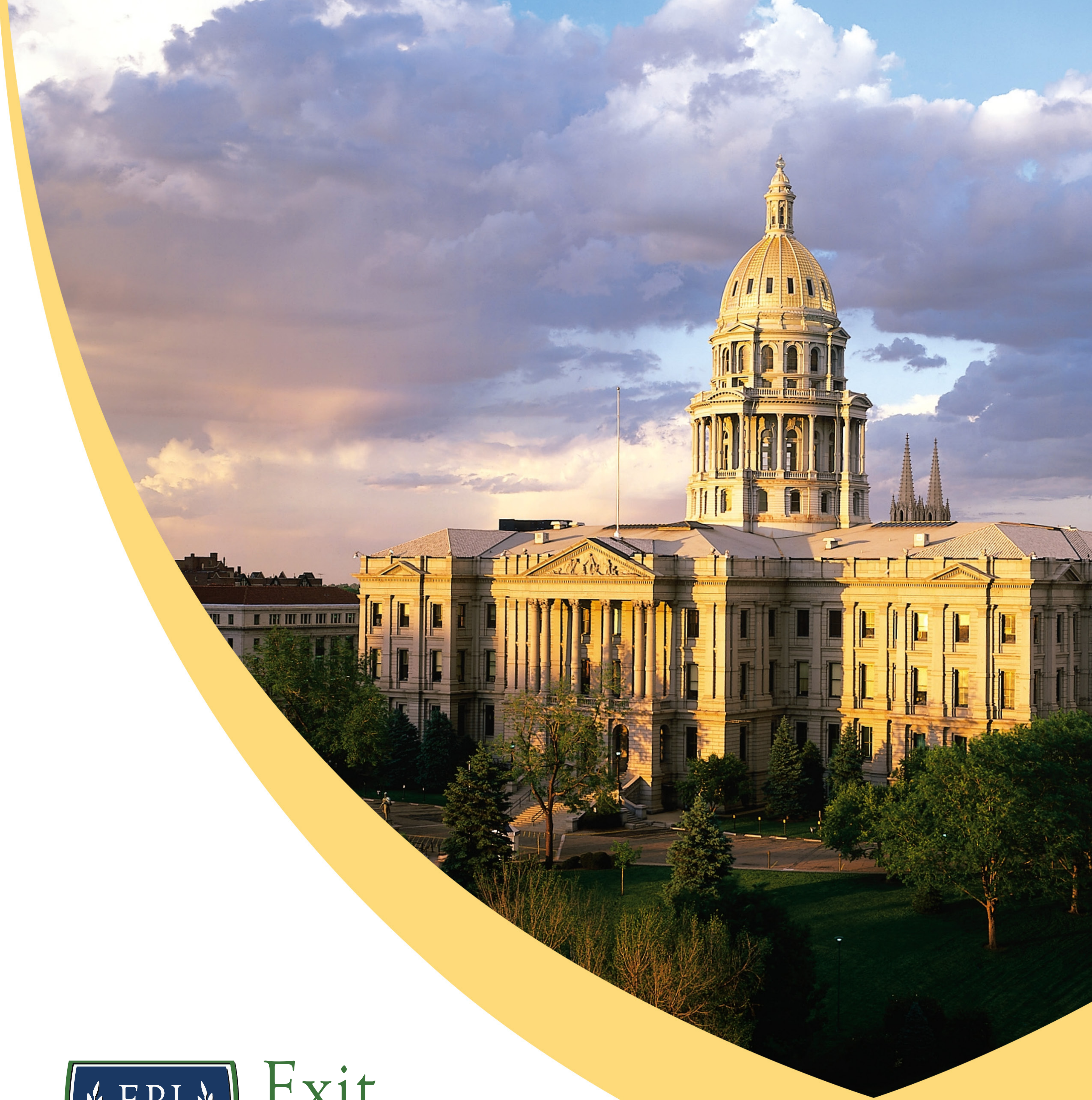
Robert A. Lock

Founder & Outsourced Sales Leader, Buffalo Mountain Sales Strategies
Email: robert@buffalomountainsales.com
Web:www.buffalomountainsales.com
EPI Member Since: 2024

Robert fixes broken Sales Machines for companies in the Manufacturing, Industrial & 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.

CHAPTER DIRECTORY

- Matthew Allen
- Malcolm Aylett
- Michael Brady
- Zach Broyles
- Scott Casper
- Justin Davis
- Keith Eckhardt
- Anthony Englert
- Bettsee Gotwald
- Dustin Jeschke
- Jared Johnson
- Chris Mayer
- Scott Mitchell
- Michael Mittman
- Steven Nuccio
- Richard Palmersmith
- Julie Pressnell
- Anthony Satriano
- Matthew Woolbright



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