

















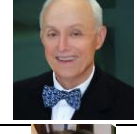
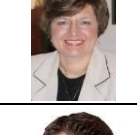




EPI SE MI Chapter Directory, as of April 2021								
Headshot	First	Last	Email Address	Phone	Website	Professional categorization	What's your one sentence tagline?	List up to 5 services you specialize in:
	Bradley	Bocketti	bradley.bocketti@ubs.com	734-416-1591	<a href="#">link</a>	Financial Advisor	Simple. Personal. Complete.	(1) Partnering with clients to create a sustainable financial plan (2) Aligning assets with client's values and goals (3) Multi-generation wealth transfer (4) Asset allocation / portfolio analysis
	Jim	Carpenter	james.carpenter@fmr.com	614-400-2413	<a href="#">link</a>	Charitable Planning Consultant	We help entrepreneurs optimize their desire to give back to the community.	Charitable Gift Planning, especially around business liquidity transactions.
	Craig	Doescher	craig@doeschergroup.com	248-808-0416	<a href="#">link</a>	Consultant/Value Adviser	Financial advice and implementation for businesses in transition.	Exit Audits Fractional Operational Financial Resource Investor Management (Banks) Capital Raising (Financial Modeling, Due Diligence) Business Negotiation
	Terry	Dwyer	tdwyer@salesxceleration.com	317-694-9833	<a href="#">link</a>	Consultant/Value Adviser	I help small businesses build great sales strategies, teams and results.	Sales, Marketing, Strategy
	Cara	Ehinger	cara@superiorintegrationllc.com		<a href="#">link</a>			
	Jeff	Farrington	j.farrington@focusco.com	586-246-8289	<a href="#">link</a>	Consultant/Value Adviser	Assisting small businesses through part-time CFOs & navigating the exit planning process	Experienced part-time CFOs Value Advisor - Exit Planning Quarterback
	Diana	Freeburg	diana.freeburg@ubs.com	248-737-5459	<a href="#">link</a>	Wealth Management/Financial Planner	Helping business owners navigate the sale of their business and implementing a personalized strategy to manage the proceeds and achieve your life goals after you step away	1. Advanced Financial Planning 2. Exit Planning Strategies 3. Estate Planning Strategies – Wealth Protection 4. Customized Portfolios 5. Cash Flow Planning
	Sarah M	Greifenberger	Sarah@arborvaluation.com	203-494-3185	<a href="#">link</a>	Valuation Analyst and CEPA	I help owners understand what their business is worth.	Valuation for Exit Planning, Gift/Estate Taxes and Exit Planning Consulting
	Catherine	Juon	catherine@87plus.com	734-646-3201	<a href="#">link</a>	Professional EOS Implementer	Helping entrepreneurs get more of what they want out of their business	Just one -- rockstar EOS implementation. :-)) I love helping entrepreneurs turn the tables and get a grip on their business - and in turn, transform their lives and the lives of people around them. I adopted "Traction" as the owner of an internet marketing company myself, exited that business, and now help other business owners do the same. I've also witnessed the personal power of Traction as it helped me recently go from breast cancer surgery to Ironman in 12 weeks!




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	Cathy	Kosin	ckosin@oswaldcompanies.com	248-433-7602	<a href="#">link</a>	Insurance/Risk Professional	We see risk so you see opportunity.	Employee Benefits, Property & Casualty, Personal Client Management, Life and Retirement Plans
	Don	Lee	dlee@chiefoutsiders.com	248-459-0843	<a href="#">link</a>	Growth Advisor	Don helps organizations build growth engines by being curious, creative and challenging the status quo drawing from his 25 years of C-Level experience.	Develop Go-To-Market Strategies, Fractional Chief Marketing Officer, Conduct Growth Work Shops, Build Growth Engines, Advise C-Suite
	Jason	LeRoy	LeRoy@doeren.com	248-244-3000	<a href="#">link</a>	Consultant/Value Adviser	I provide business valuation and financial consulting services	Business valuation, forensic accounting, litigation support, expert witness testimony
	Lesli	Matukaitis	l.matukaitis@focusco.com	586-764-4814	<a href="#">link</a>	Consultant/Value Adviser	Great Lakes Business Transition Group's mission is removing the risk and complexity of transition planning to bring business owners maximum value with minimal stress.	Commercial Loan Brokering Fractional CFO Services Transition Planning as a Value Adviser
	Kevin	McDevitt	kevin.mcdevitt@ubs.com	248-637-0216	<a href="#">link</a>	Wealth Advisor	Providing forward-thinking, solution-oriented advice to business owners.	Multi-generational financial planning; Business Transition Planning: Before, during and after the sale; Cash flow analysis; Developing and implementing custom portfolios; Establishing collaborative advisory teams
	Greg	Merrill	gregory.merrill@ubs.com	203-705-4218	<a href="#">link</a>	Wealth Management/Financial Planner	Helping families navigate significant financial transitions.	1) Investment Consulting - Minimizing lifestyle risk 2) Advanced Planning - Wealth Protection, Wealth Transfer, Wealth Enhancement, Philanthropic Planning 3) Relationship Management - Access to thought-leaders across the globe for any need.
	Chris J.	Meso	cmeso@trexadvisory.com	248-320-7402	<a href="#">link</a>	Business Strategic Coach	Help business owners reduce Chaos	Strategic Business Coaching
	Jamal	Mosallam	jamal@parkshorecapital.com	313-573-8728	<a href="#">link</a>	Consultant/Value Adviser	Working side-by-side with you, we will help you improve the value of your company.	Debt and Equity Financing, Value Generation and Management Consulting, Corporate Finance

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	Glenn	Nixon	gnixon@salesxceleration.com	810-922-5448	<a href="#">link</a>	Sales Advisor	I help B2B business owners build a path to better sales.	Sales infrastructure development Sales strategy and tactics Driving accountability and discipline into the sales team Help business owners build a solid foundation for ensuring revenue sustainability and growth
	Deric	Righter	drichter@FirstMerchants.com	734-384-8243	<a href="#">link</a>	Wealth Advisor	Helping you prosper.	Services Wealth management Financial planning Estate and trust Business succession planning
	Scott	Schaefer	SSchaefer@salesxceleration.com	847-525-8166	<a href="#">link</a>	Consultant/Value Adviser	Your Fractional Sales Leader For Sustainable Growth	Fractional Sales Management, Family Business Dynamics, Industry-Agnostic Sales Management, CRM Design & Implementation
	Chuck	Scrafano	chuck.scrafano@gmail.com	248-866-5173		Insurance/Risk Professional	For over 25 years have been assisting businesses and individuals with all their insurance and risk management needs.	Life Insurance, Employee Benefits, Property & Casualty Insurance
	David	Stanislaw	dstanislaw@stanislawconsulting.com	866-222-7272	<a href="#">link</a>	Organizational Development Consultant	We exist to elevate the workplace experience by enhancing organizational health.	Workplace conflict resolution Executive Coaching Succession planning
	Laurie	Stegenga	lstegenga@fcmadvisors.net	734-429-4680	<a href="#">link</a>	Wealth Management/Financial Planner	Foresight-with prudence and care to plan for the future!	Wealth management, Financial Plans, 401(k), 403(b), 457 plans, Trigger Events, Tax Consulting and Fiduciary Consulting
	Todd	Sullivan	todd@apg.world	248-781-0072	<a href="#">link</a>	M&A Transaction Advisor for Businesses with \$1-\$25M of EBITDA	Risk Free M&A	(1) Creating expert M&A teams to sell business for founders and business owners, (2) Structuring exits for optimal financial and professional comes for founders and business owners, (3) Shepherding our fellow founders through each phase of the M&A process, (4) Preparing and enhancing management teams for successful transitions post sale, (5) Speaking with and educating founders on all their options before deciding to sell their business
	Matthew	Surowiec	msurowiec@timefin.com	248-390-4161		Insurance/Risk Professional	Advisor to the Advisor for estate and insurance planning.	Life insurance review, new life insurance implementation, estate planning, business planning, alternative retirement strategies



Southeast Michigan Chapter

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Headshot	First	Last	Email Address	Phone	Website	Professional categorization	What's your one sentence tagline?	List up to 5 services you specialize in:
	Scott	Tappan	stappan@salesxceleration.com	248-515-8799	<a href="#">link</a>	Consultant/Value Adviser	Strategic Sales Solutions, through focus, compassion and transparency	Outsourced VP of Sales. Sales planning. Forecasting. Compensation planning. Hiring sales professionals
	Gerald	Wernette	gerald.wernette@rehmann.com	248-579-1163	<a href="#">link</a>	CPA, RIA, AICPA, CEBS, C(k)P	Custom Plan Design + Tailored Fiduciary Management = Retirement Success	Retirement plan design, administration, consulting, fiduciary oversight, investment advisory and participant education/engagement. Consulting with respect to utilizing tools like non-qualified deferred compensation plans, ESOPs and others for retention and succession planning.
	Michael	Witzke	mwitzke@mcdonaldhopkins.com	248 593-2948		Attorney	I help clients link their estate plan to their business plan	Estate planning; Business succession planning; Probate and Trust Administration; Charitable planning
	Paul	Zaleski	pzaleski@expensereduction.com	847-525-0444	<a href="#">link</a>	Consultant/Value Adviser	Value through Insight	Expense reduction across 30+ expense categories