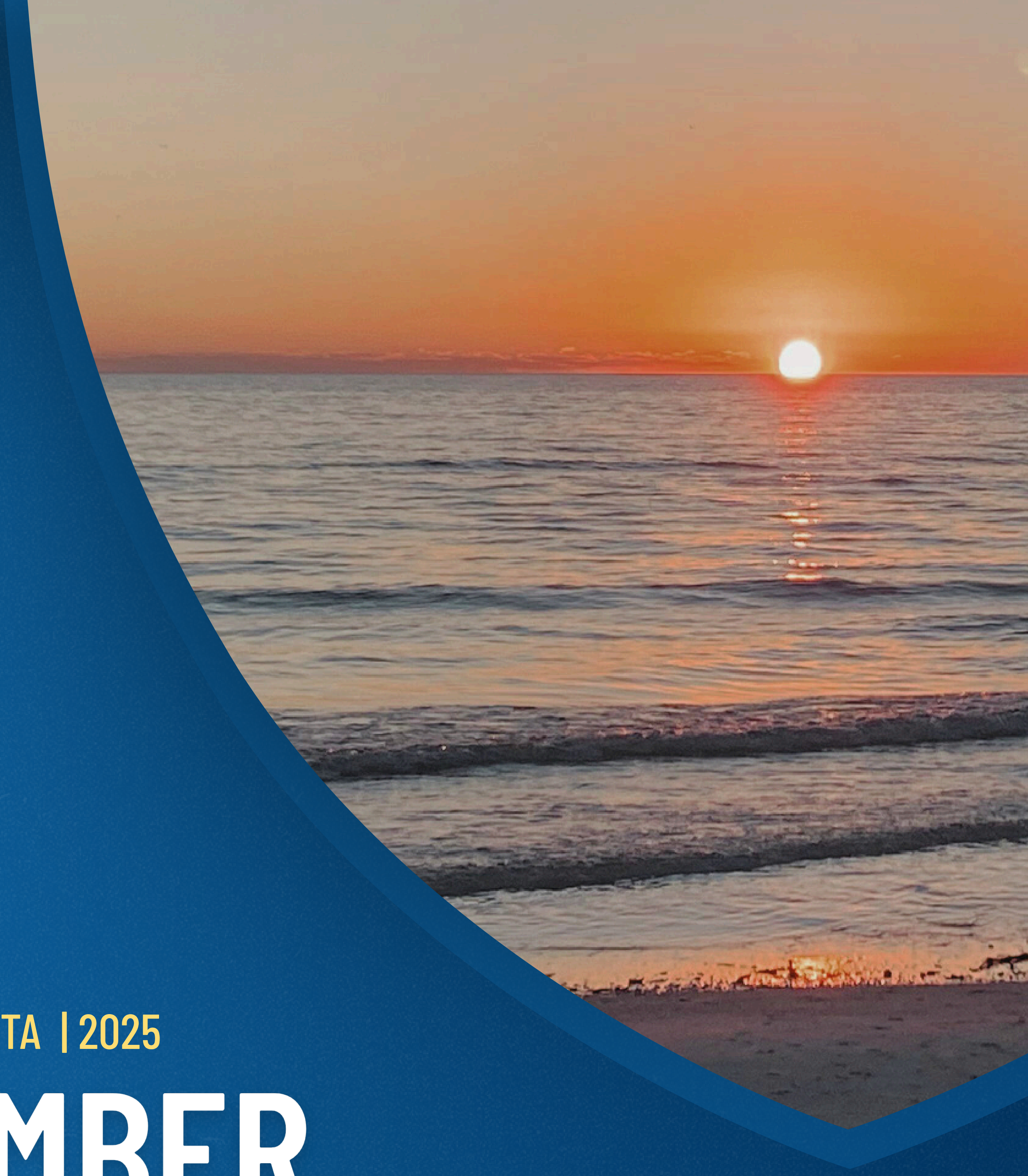

EPI SARASOTA | 2025

MEMBER DIRECTORY

Meet Our Community of Advisors and Chapter Leaders

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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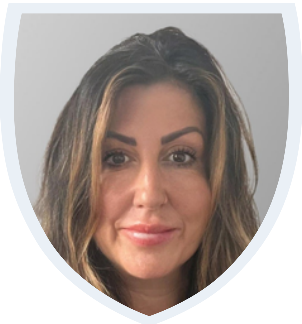
EPI Sarasota Chapter President

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

Maria Bizzaro

ADP, Director, Private Equity
maria.bizzaro@adp.com | 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. She helps organizations align and execute global technology strategies that deliver real results. Whether working with private equity firms after acquisitions or supporting long-term plans, she brings a consultative, results-focused approach.

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

Kristin Carlson, CEPA

K&D Lake Country Team LLC, Certified Master Business & Executive Coach
kcarlson@focalpointcoaching.com | LinkedIn

Kristin brings over 30 years of corporate leadership experience and a lifelong background in team sports to her business coaching. She built high-performing technical teams by focusing on servant leadership and helping individuals reach their full potential. Since 2018, Kristin has helped business owners and executives improve performance, accelerate growth, and lead with purpose. Her work is grounded in Focal Point's vision: "Leading leaders to optimize their overall business performance and reach their full potential."

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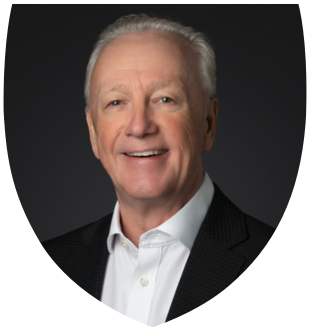
Tina Corner Stolz, CEPA

Founder, LXCouncil
tina@lxcouncil.com | LinkedIn

Tina is the Founder of LXCouncil and 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 Mastermind Mastery 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.

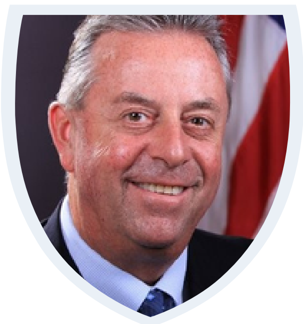


EPI Sarasota Board Member

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

Tim Meinhardt, CEPA

Atruity, Fractional COO, Owner & Founder
tim@atruity1.com | 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.

EPI Sarasota Board Member

Doug Sullivan, CEPA, CCIM, CBI

SEPA Florida, M&A Advisor, Business Broker, Commercial Realtor
doug@sepaflorida.com | LinkedIn

Doug has a wealth of expertise, with a keen sense of strategy and a track record of success. He is Co-Founder 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.

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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.

EPI Sarasota Board Member

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.

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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.

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.

William Chase, CPA, CFP

HBKS Wealth Advisors, Senior Financial Advisor

Email

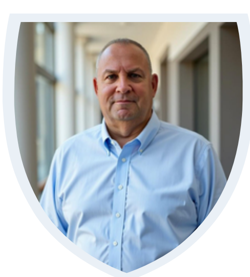
Will Chase is a senior financial advisor at HBKS® Wealth Advisors in Sarasota with over a decade of experience in public accounting and financial planning. A CPA and CFP®, he helps individuals and businesses build strategies to meet long-term financial goals.

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.



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.

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Christopher Fehr, CPA, CEPA

Freedom Financial Wealth & Tax, Founder
Email | LinkedIn

Chris Fehr 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.

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.

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 Vice President
Email | LinkedIn

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.

Kyle Lonsinger, CFP, CIMA

Accurate Advisory Group, Wealth Advisor
Email | LinkedIn

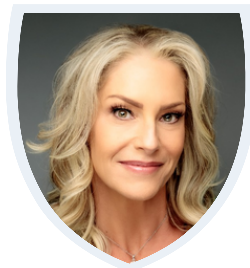
Kyle Lonsinger is a third-generation financial advisor driven by a personal understanding of what it means to be a trusted partner. Since 2016, he's helped individuals and families build strong financial futures.

CHAPTER MEMBERS

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.

Steven Sadowski, CEPA

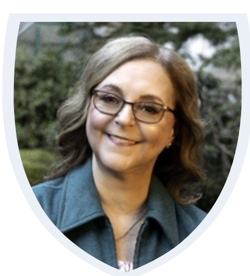
Sunstate Business Brokers, Sales Associate
Email

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.

Michael Shea, P.A., CEPA

Transworld Business Advisors, Senior Partner
Email | LinkedIn

Michael Shea 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.

CHAPTER MEMBERS

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.

Jonathan Tubbs

Congdon & Co, Director of Concierge Services

[Email](#) | [LinkedIn](#)

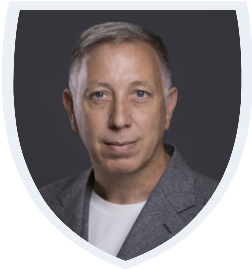
After 16 years in the securities industry, Jonathan saw the risks of disjointed advice. He now focuses on a family office model—integrating advisors to deliver holistic, coordinated guidance that truly serves the client's full financial picture.

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.

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FourFront Wealth Management

FourFront Wealth Management is a holistic wealth planner with a sophisticated client base that demands robust offerings and complex financial planning. As independent investment advisors, we follow the fiduciary standard and are required to put our clients' interests ahead of our own. 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.

www.fourfront.com

FourFront
Wealth Management

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.

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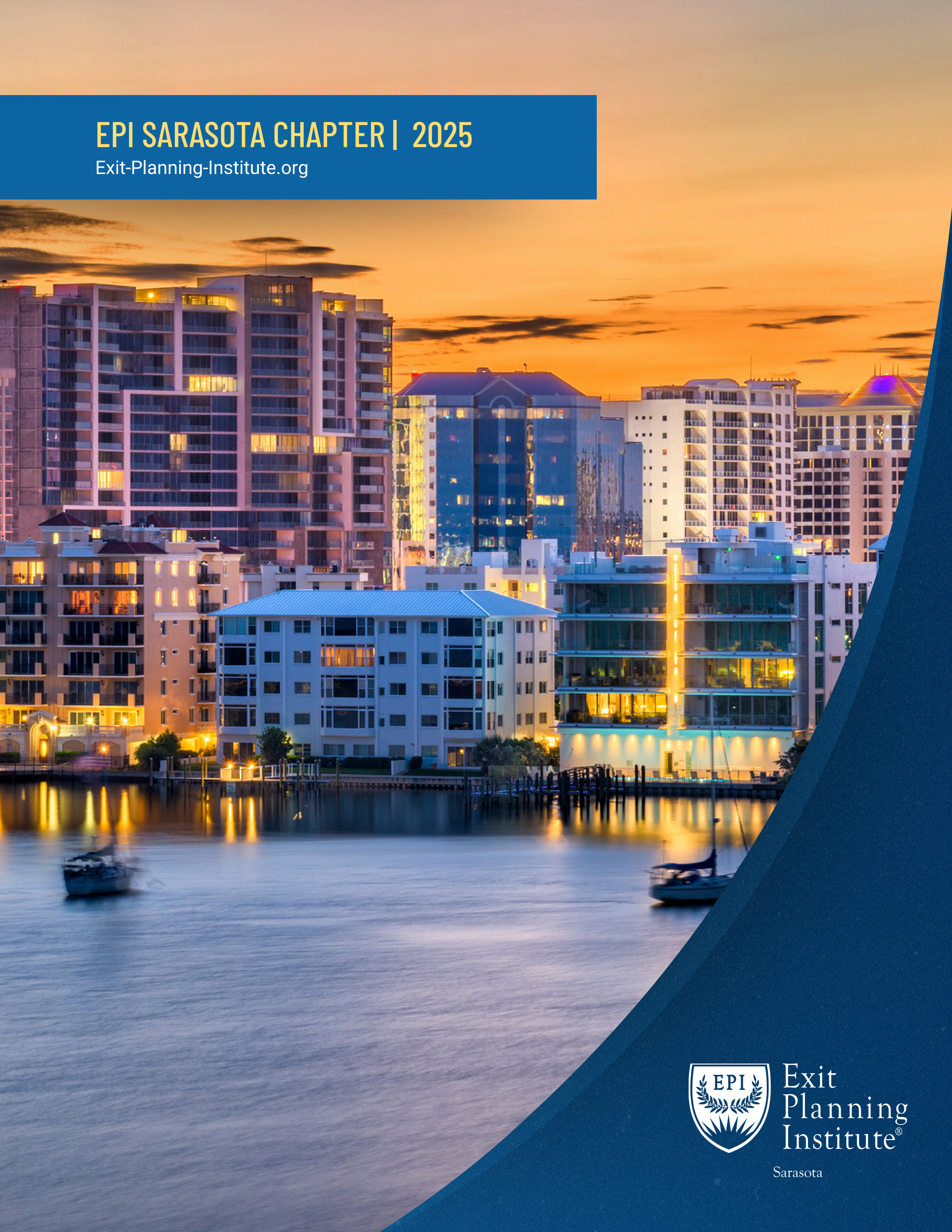

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