

The logo features the letters 'SV' in a large, white, stylized font. The 'S' is a thick, curved line, and the 'V' is composed of two thick, angled lines meeting at a point. Below the 'SV' is the text 'SILICON Y'ALL' in a white, sans-serif font. The 'Y' is stylized, with its top bar integrated into the 'V' and its bottom bar as a solid white rectangle.

SV SILICON Y'ALL

OCTOBER 5 – 7, 2026
BIRMINGHAM, ALABAMA

SILICON Y'ALL 2026 HOSTS

Founders
Advisors 



Morgan Stanley





DEAR CEOS, FOUNDERS, LEADERS & FRIENDS –

We are delighted to welcome you to Silicon Y'all 2026, our 12th annual Technology Summit at the beautiful Renaissance Ross Bridge Resort & Spa, where over 175 of your distinguished peers have gathered.

DURING THIS SUMMIT, YOU CAN LOOK FORWARD TO:

- **Inspiring Stories:** Gain insights from fellow entrepreneurs as they share their successes and challenges.
- **Networking Opportunities:** Connect with top leaders in the technology industry, fostering valuable relationships.
- **Investor Insights:** Delve into the mindset of acquisitive tech investors and strategic buyers.
- **Growth Strategies:** Discuss innovative approaches that are driving success for your peers.
- **Financing Solutions:** Explore creative debt and equity financing structures to fuel your growth.
- **Best Practices:** Learn effective strategies for maximizing enterprise value.

This elite retreat is crafted to harness the collective wisdom of this exceptional group. We are committed to making this experience both enriching and enjoyable, infused with warm Southern hospitality.

Looking forward to an impactful two days together!

Warmest regards,

The Founders Advisors Team



*More than an event,
this is an intimate
gathering where
each participant's
experiences and
expertise help
shape meaningful
conversations
and learnings.*



MONDAY, OCTOBER 5

- 4:00 PM - 6:00 PM **Register & Revel** – Check in, relax, and enjoy Ross Bridge Resort's many offerings before the welcome reception
- 6:00 PM - 8:30 PM **Welcome Reception & Dinner** – Cocktails and dinner in the Hoover Ballroom
- 7:20 PM **Winning in the AI 2.0 Era** – Why Your Biggest Obstacle Isn't AI. It's You.
Victor Cheng – Founder & CEO, SaaSCEO.com
- 7:55 PM **Interactive Kickoff**
- 8:30 PM - 10:00 PM **Birds of a Feather** – Network and enjoy time with your peers

TUESDAY, OCTOBER 6

- 6:30 AM - 9:00 AM **Breakfast** – Please enjoy breakfast at Brock's restaurant
- 6:30 AM - 9:00 AM **Open Court: Pickleball and Tennis** – Hit the courts for a quick match at your leisure
- 7:00 AM - 8:00 AM **Morning Trail Run** – Enjoy the scenic beauty of Ross Bridge with a 3-mile jog along the local trail
- 7:00 AM - 8:00 AM **Putting Class** – Hone your putting skills with a Pro
- 7:00 AM - 8:00 AM **Morning Yoga** – Wake up with a slow-flow yoga session on the Terrace
- 7:00 AM - 8:00 AM **Morning CrossFit WOD** – Break a sweat with a high-intensity CrossFit-style workout led by professional US Women's CrossFit athlete, Ellie Hiller
- 9:00 AM - 9:15 AM **Opening Remarks** – Hoover Ballroom
- 9:15 AM - 9:45 AM **CEO Reality Check** – What PE Sponsors Expect Next in 2027
- 9:45 AM - 10:15 AM **The Growth Gauntlet** – Knowing When Your Leadership Team Has to Change
Meg Crosby – Principal, PeopleCap Advisors
- 10:15 AM - 10:30 AM **How Your Attorneys are Leveraging AI** – And Why It Matters to You
Zach Crowe – Partner, Gunderson Dettmer
- 10:30 AM - 10:45 AM **Break**
- 10:45 AM - 11:15 AM **CEO Blitz Sessions** – CEO Stories of Successes, Failures, & Lessons Learned
The Silent Killer – Your Biggest Threat Looks Like Stability
Dave Gray – CEO, Arcoro
When The Plan No Longer Matters – Navigating What You Never Expected
Bubba Grimsley – Founder, Liberty Rent

TUESDAY, OCTOBER 6, CONT.

- 11:15 AM - 12:00 PM **The AI Growth Engine** – The Imperative to Adapt to AI Search and Drive Visibility
Shiv Narayanan – Founder & CEO, How To SaaS
- 12:00 PM - 12:30 PM **The Leadership Multiplier** – Unlocking the Hidden Performance of Your Talent
Jordan Jones – Policy Chief at the Florida House of Representatives; Consultant, Fifth Letter
- 12:30 PM - 1:30 PM **Networking Buffet Lunch**
- 1:30 PM - 2:00 PM **Heads Up** – Test Your Knowledge Against Your Peers
- 2:00 PM - 2:30 PM **Beyond the AI Hype** – Where Companies Are Actually Making—and Saving—Money
Jason Parrish – General Partner, Altus Nova Technologies
- 2:30 PM - 3:00 PM **Wisdom of the Crowd** – Real-time answers to participant questions from your peers
Helpful or Headaches – Avoiding the Traps of Early Board Setup
Ian Juliano – CEO, Paragon Health Ventures
- 3:00 PM - 3:30 PM **When Deals Get Messy** – High Value Lessons Learned from the Trenches
Aprio, CAC Specialty, and Warren Averett
- 3:30 PM - 3:50 PM **Break**
- 3:50 PM - 4:25 PM **The New Economics of AI** – Pricing for Growth, Margin, and Enterprise Value
Brian Russell – VP of Pricing Strategy, Mainsail Partners
- 4:25 PM - 4:50 PM **Before the Wire Hits** – The Wealth Decisions Every Founder Should Make Before Liquidity
Morgan Stanley and Bespoke Capital of Raymond James
- 4:50 PM - 5:00 PM **Announcements**
- 5:00 PM - 6:30 PM **Rest, Recharge, & Connect**
- 6:30 PM - 7:00 PM **Cocktail Reception** – Cocktails on the Terrace
- 7:00 PM **Bama Bash** – Relax with your peers while enjoying rich Southern cuisine, cigars around the fire pit, and the crisp October air

WEDNESDAY, OCTOBER 7

7:15 AM - 8:00 AM	Networking Breakfast Buffet – Hoover Ballroom
8:00 AM - 8:30 AM	Wisdom of the Crowd – Real-time answers to participant questions Taking Action – How and Why I Made a Quick Pivot <i>Ross Croley – CEO & Founder, Greater Sum Ventures</i> Beyond the Founder – Reducing Risk & Building Business Value in an AI World <i>Dave Parker – Founder & CEO, Trajectory Network</i>
8:30 AM - 9:05 AM	Tactical Insights from Over 100 AI-Software Development Lifecycle Transformations <i>William Blackburn and Peter Inge – Co-CEOs, DevClarity</i>
9:05 AM - 9:40 AM	Non-dilutive Financing for Growth and M&A in a Turbulent Market – Exploring Senior Debt, Mezz Financing, & ARR Lending <i>Expert Discussion featuring Western Alliance, Recurring Capital, and Runway Growth Capital</i>
9:40 AM - 10:00 AM	A Founder's Story – Navigating a Deeply Emotional Decision
10:00 AM - 10:20 AM	Break
10:20 AM - 10:50 AM	Scaling Special – Staying True to What Matters as You Grow <i>Worth Lumry and Sara Storck – Red Wagon Ventures; Chick-fil-A</i>
10:50 AM - 11:20 AM	Trust is the New Currency – How the Right Relationships Create Unique Advantages <i>John Hall – Chief Advisor, Relevance; EY Entrepreneur of the Year Award Recipient</i>
11:20 AM - 11:45 AM	The AI Readiness Checklist – The AI Questions Every PE Firm Will Ask
11:45 AM - 12:00 PM	Blitz Session – Stories of Successes, Failures, & Lessons Learned <i>Nate Purdum – Director, Koch Disruptive Technologies</i>
12:00 PM - 1:00 PM	Investor Hot Seat Lunch & Learn – Hear Hard-Hitting Hot Takes from Investors Who Have Seen it All
1:00 PM - 1:20 PM	Open Mic – Takeaways & Action Plans
1:20 PM - 1:30 PM	Closing Remarks
1:45 PM	Shuttle Departure to the Birmingham Shuttlesworth International Airport
6:00 PM	Silicon Y'all AfterGlow – Reflect on your learnings, conversations, and actionable takeaways around the dinner table with other participants who are staying in town Wednesday night

Formal events and activities end at 1:45 PM Wednesday afternoon, but feel free to join many participants who stay longer and continue to build relationships, exchange ideas, and enjoy the natural and cultural beauty of the Ross Bridge Resort.

THE FOUNDERS ADVISORS TEAM



ZANE TARENCE
HEAD OF STRATEGIC
PARTNERSHIPS



CHRIS WEINGARTNER
HEAD OF ENTERPRISE GROUP



THOMAS DIXON
MANAGING DIRECTOR



NEAL ENGLAND
MANAGING DIRECTOR



BRAD JOHNSON
MANAGING DIRECTOR



MICHAEL WHITE
MANAGING DIRECTOR



CHRIS JENKINS
DIRECTOR



TUCKER HELMS
VICE PRESIDENT



SWEDE UMBACH
VICE PRESIDENT



RACHAEL JENKINS
PRACTICE GROUP MANAGER



HAMPTON SIMMS
ASSOCIATE



ZACH SMITH
ASSOCIATE



NICHOLAS FROST
ANALYST



PATRICK MALUFF
ANALYST



BO MARADIAK
ANALYST



JAMES NICHOLS
ANALYST



GRACIE JINRIGHT
PRACTICE GROUP COORDINATOR

FOUNDERS ADVISORS OVERVIEW

Founders is a mergers, acquisitions, and strategic advisory services firm that has served middle-market companies **since 2003**. With a nationwide footprint, we pride ourselves in employing a values based and highly personalized relational approach to capital transactions through our five industry-focused advisory teams. **Today, Founders employs over 60 professionals and has offices in Birmingham, AL (headquarters), Dallas, TX, and Nashville, TN.**

Values Driven Culture

- ORDER** Maintain focus on doing the right things at the right time
- SERVICE** Go the extra mile for our clients, co-workers & community
- GROWTH** Reflect, evaluate, and plan for improvement
- EXCELLENCE** All we do, we do well
- HEALTH** Be and stay healthy, personally, and as a team
- COMMUNITY** Be team-focused; we're better together

Industry Expertise

-  Software, Technology, & IT Services
-  Business Services
-  Consumer
-  Healthcare
-  Industrials

Relationship Driven. Results Oriented. Founder Focused.



'26 PARTICIPANTS

"Show me your peers and I'll show you your future."

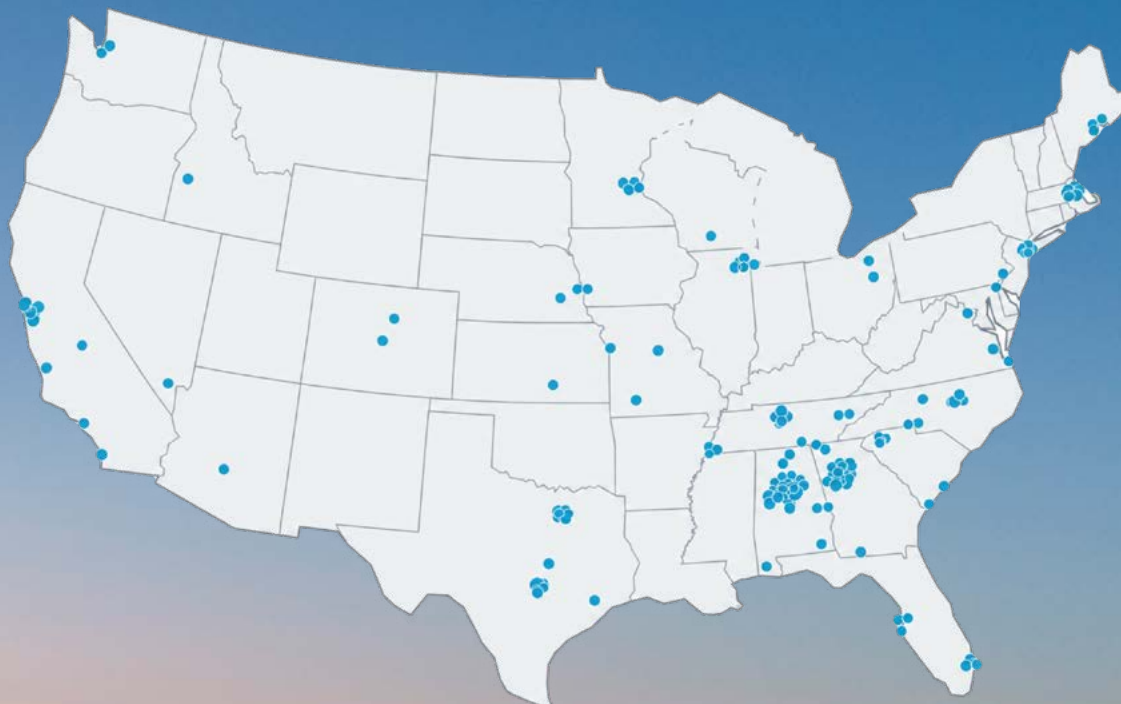
195 PARTICIPANTS

24 STATES

4 COUNTRIES

1 CONFERENCE





INTERNATIONAL REPRESENTATION

Canada | Germany | United Kingdom





VISTAGE

ANKUR AGARWAL

VISTAGE CHAIR | VISTAGE

Ankur Agarwal is Founder and General Partner of Executive Venture Fund, investing in early stage enterprise AI and cybersecurity companies. Previously, as Managing Director at Vista Equity Partners, he built and led its AI consulting practice. His career includes roles at BCG and Microsoft Research, and he has evaluated hundreds of AI companies across venture investing, acquisitions, and enterprise adoption. Ankur holds a PhD in AI/ML, studied Computer Science at IIT Delhi, and was a Research Fellow at Cambridge. He also chairs CEO peer groups through Vistage, helping leaders drive AI-enabled enterprise value. Born in Southern Africa, Ankur has lived and worked across India, France, the UK, and the US. On the personal side, Ankur has a spiritual outlook on life and is currently exploring more advanced yoga and meditation practices.



**Warren
Averett**
CPAs AND ADVISORS

HANNY AKL

MEMBER | WARREN AVERETT

Hanny Akl, CPA, CFE, CEPA, CVGA, leads Warren Averett's Transaction Advisory Services Practice, specializing in buy-side and sell-side advisory services and helping business owners maximize enterprise value. As one of the leaders of the firm's Technology Group, he advises software, SaaS and technology-enabled companies as well as investors and institutional capital through key growth and transaction milestones. Beyond his client work, he mentors entrepreneurs through Techstars and other nationally-recognized accelerator programs and serves as the treasurer on the Executive Committee of the Board of Directors for Innovation Depot, supporting innovation and startup growth across the Southeast.



Morgan Stanley

FARRA ALFORD

PRIVATE WEALTH MANAGEMENT | MORGAN STANLEY

Farra is a 15-year veteran in family wealth management and has spent the past 13 years with Morgan Stanley, serving closely held business owners. With significant wealth comes significant complexity, opportunity, and responsibility. Having personal experience with the effects significant wealth creation has on interpersonal relationships and family dynamics, Farra thrives on advising clients on how to create strategic synergy between the structuring of corporate ownership, estate plans, family governance and investments. This approach serves to support families across generations as they work to utilize their wealth to establish a defined sense of individuality, purpose, and satisfaction in life. Outside of the office, Farra enjoys time with his wife, Lacey, and two daughters, and serves on the board of his local church, Oak City, and Trinity Counseling.

DAVID BARNES

EVP, HEAD OF PRIVATE EQUITY AND M&A SOLUTIONS | CAC SPECIALTY

David Barnes leads the Representations & Warranties Insurance and Private Equity Practices at CAC Specialty. David and the team have placed billions in insurance limits across transactional risk products, including R&W, complex litigation risk, stop-loss, and successor liability placements, spanning industries from financial services and technology to manufacturing and renewable energy. He also leads CAC Specialty's integrated Private Equity Practice, bringing together insurance and employee benefits diligence with go-forward brokerage teams. Before entering insurance, David practiced law at King & Spalding and Miller & Martin, focusing on complex insurance coverage matters.



THOMAS BARNHART

CO-FOUNDER | INBOX MONSTER

Thomas Barnhart is Co-Founder of Inbox Monster, where he leads Global Strategy and Go-to-Market. With over two decades of experience in marketing technology, Thomas has been instrumental in building and scaling organizations that drive measurable impact for enterprise brands. He was a key executive at BrightWave, guiding its growth and successful exit, before taking on the role of leading Global Revenue at Ansira, a \$275M customer engagement and channel marketing firm. Throughout his career, Thomas has focused on developing growth strategies that align technology, data, and customer experience to fuel sustainable B2B businesses. At Inbox Monster, he continues to apply this expertise, helping global organizations unlock the full potential of their marketing operations through innovation, scale, and strategic execution.



GAVIN BAUM-BLAKE

CEO & CO-FOUNDER | CITY DETECT

Gavin is the CEO and co-founder of City Detect, an AI-powered platform that helps local governments proactively detect and fix urban blight. City Detect equips city vehicles like trash trucks and street sweepers with mounted cameras, then applies computer vision and machine learning to spot blight in real time and provides municipalities with actionable data to help them stretch resources, respond faster, and create cleaner, safer neighborhoods. Since launching in 2021, City Detect has raised \$15 million, expanded to over 17 cities, and works with local governments in metro areas like Dallas and Miami. Gavin is a U.S. Army veteran and licensed attorney. He earned his bachelor's degree from PennWest California and his JD from the University of Alabama School of Law.





ROBERT BELCHER

MANAGING DIRECTOR | SAAS CAPITAL

Robert Belcher is a managing director at SaaS Capital, a provider of debt-based growth financing for B2B SaaS businesses in the United States, Canada, and the UK. SaaS Capital provides facilities ranging from \$2-20M with availability based on a multiple of a company's monthly recurring revenue. Founded in 2007, SaaS Capital has funded more than 100 companies across four funds. Prior to joining SaaS Capital, Robert held positions at Wood Mackenzie, Voyager Capital, and held a senior executive position at Lighter Capital, where he completed 60 financings. Robert earned his B.A. in Economics from Colby College and his MBA from UW Foster School of Business.



TOMMY BELTON

VICE PRESIDENT | M33 GROWTH

Tommy is passionate about partnering with management teams and helping them execute their long-term vision. Prior to M33, Tommy worked as a software investment banker at Aeris Partners. While at Aeris, Tommy focused on executing M&A transactions across a number of different vertical application markets including Healthcare IT, Energy, and EdTech. This work included iN2L's sale to Vista Equity Partners and W Energy Software's strategic investment from True Wind Capital. Prior to Aeris, Tommy worked as a consultant and software engineer at Eze Software Group (now SS&C Eze), a financial software company. Tommy graduated from Boston College and received his MBA from MIT Sloan School of Management. He is also a CFA Charterholder. Outside of work, Tommy enjoys running and spending time with his family.



KARTHIK BETTADAPURA

CEO | DATAWEAVE

Karthik Bettadapura is Co-Founder and CEO of DataWeave, the AI Commerce Intelligence Cloud that powers every SKU decision for retailers, marketplaces, and consumer brands across pricing, assortment, content, digital shelf, and retail media. He has spent more than 15 years building large-scale data platforms, with deep roots in information retrieval and distributed systems, the same disciplines that now sit at the heart of AI-driven commerce. He leads DataWeave's product vision and business strategy and has scaled the company from a Bengaluru startup into a global business serving leading retailers and consumer brands across North America, Europe, the Middle East, and India.

KRISTOPHER BISHOP

CEO | FINTEGRATE TECHNOLOGY

Kristopher Bishop is the CEO of Fintegrate Technology, delivering fraud prevention and compliance automation for dispute management to banks and credit unions nationwide. He has completed three successful exits to public companies and large PE firms and has a proven record as a M&A operator having integrated 18+ acquisitions at Jack Henry & Associates. He has served 5,000+ financial institutions across a 20+ year career. Fintegrate currently operates 125+ installed clients across institutions ranging from \$100M to \$200B+ in assets, positioned as a consolidation platform in a fragmented banking and fintech marketplace.



Fintegrate
TECHNOLOGY

WILL BLACKBURN

CO-CEO | DEVCLARITY

Will Blackburn is a software founder, AI advocate, and product-minded technologist helping engineering leaders create high-performing teams. He is Co-CEO of DevClarity, which helps development leaders transform how they build software in the age of AI. Will also co-founded Birmingham AI, a growing AI meetup that draws 500+ in-person attendees each month and serves as a hub for AI professionals, builders, and enthusiasts across the Southeast. He is passionate about the future of human-AI collaboration, building a better city, and creating software. Will lives in Birmingham with his wife and two sons.



 **devclarity**

JAY BLAND

CGO | GREENCOURT

Jay Bland is, first and foremost, a father to two wonderful children - Jack (5) and Josie Lee (3). When he's not chasing toddlers, Jay drives new business opportunities that benefit GreenCourt while serving the real needs of government agencies, courts, and the public. Jay is passionate about leadership development, and brings intentionality to every relationship, whether coaching his team, partnering with clients, or shaping industry conversations. He believes in the power of captivating storytelling. It's what turns complex technology into real-world impact, helping stakeholders grasp not just what GreenCourt's platforms do, but why it matters. A policy and legislative affairs expert, Jay guided strategy during Georgia's shift from permissive to mandatory eFiling. He's a member of the State Bar of Georgia, serves on the WICSEC board, is a past NCSEA board member, and volunteers with the Truancy Intervention Project of Georgia. Jay holds degrees from Auburn, Samford, and Cumberland School of Law.




GREENCOURT™



mileauto

FRED BLUMER

CO-FOUNDER & CEO | MILE AUTO

Fred Blumer is Co-Founder and CEO of Mile Auto, Inc., a pay-per-mile insurance provider leveraging patented technologies to help low-mileage drivers save money. Fred is also the CEO of Porsche Auto Insurance, a subsidiary of Mile Auto, in partnership with Porsche Financial Services. Mile Auto recently completed the acquisition of another auto insurance provider called The Insurance House, resulting in a company with premiums approaching \$100M. Prior to Mile Auto, Fred was Co-Founder of Hughes Telematics, Inc., providing telematics systems to automakers including Mercedes Benz, and usage-based insurance solutions for insurers like State Farm. Hughes Telematics went public in 2009, and was subsequently acquired by Verizon (NYSE: VZ) for \$750M. Fred holds 10 utility patents in connected vehicle data and auto insurance systems.



FILES
.COM

KEVIN BOMBINO

FOUNDER & CEO | FILES.COM

Kevin Bombino is the founder and CEO of Files.com, the enterprise platform for moving, automating, and understanding critical business data. Under his leadership, Files.com has become the highest-rated vendor in its category - ranked #1 on both G2 and Gartner Peer Insights. This year, Kevin has led an aggressive rebuilding of the company in an AI-first, "Automate everything" approach. Kevin grew up in Arab, Alabama, studied Computer Science at Harvard, and now lives in Austin, Texas. Before Files.com, he helped pioneer the cryptocurrency movement in 2011 as one of the first Bitcoin miners and the first investor in Armory. Kevin is also an aviation enthusiast and a commercially rated pilot.



FRONT PORCH
VENTURE PARTNERS

GREGG BORDES

CO-FOUNDER & MANAGING PARTNER | FRONT PORCH VENTURE PARTNERS

Gregg Bordes is Co-Founder and Managing Partner of Front Porch Venture Partners. Mr. Bordes has 20+ years of direct investment experience across venture capital, private equity and public market investment strategies in New York, San Francisco and North Carolina. Front Porch is a hybrid venture capital firm investing in top startups and venture capital funds across the Southeast. Gregg received a Master's in Business Administration, with honors, from Duke University's Fuqua School of Business and a bachelor's degree in finance and economics, cum laude, from New York University's Stern School of Business.

WILL BRYANT

CO-FOUNDER | QUANTALYTIX

Will is the co-founder and COO of Quantalytix, a Birmingham, Alabama-based fintech startup specializing in advanced analytics and loan management systems, where he is responsible for sales, marketing, strategy and operations. Quantalytix was established to provide bank and non-bank lenders a modern solution that provides real-time access to internal and external data through a single compatible source. In his spare time, Will serves as an advisor to several startups and is a board member of HealthRounds, a non-profit dedicated to improving the health of Alabama through innovation. Will also competes in triathlons and enjoys mountaineering.



Quantalytix

MIKE BURNS

CHIEF FINANCIAL OFFICER | DATAXSTREAM

Mike Burns is the chief financial officer of DataXstream, bringing more than 26 years of accounting and finance expertise to the company. A graduate of the University of Kentucky, he began his career at a small accounting firm where his ability quickly earned him partner status. In 1995, he passed the CPA exam with scores in the top 10% nationally and went on to build a successful CPA practice. From the inception of DataXstream, Mike has been instrumental in supporting its growth and is known for his precision. Drawing on his deep knowledge of taxation and partnership management, Mike provides trusted counsel that strengthens financial operations and supports long-term strategic growth.



DATAXSTREAM

JOSH CADY

CEO | CADY

Josh Cady is a results-driven entrepreneur with a collaborative spirit who challenges the status quo in the school photography industry. Recognized as EY Entrepreneur Of The Year® Southeast, his passion for constant innovation set him apart as a visionary leader who values progress over tradition. As a leader, Josh believes “if you don’t change your mind frequently, you’re going to be wrong a lot.” He is more passionate about finding the right answers versus being the one who is right. By delivering a premier experience for seniors and schools, CADY’s strong Southeast base quickly led to a nationwide organization. Josh resides in Alpharetta, Georgia, with his wife, five kids, and two dogs. He is a four-time marathon finisher who aims to run all six of the Abbott World Marathon Majors and earn the Six Star Medal.





LISA CALHOUN

MANAGING PARTNER | VALOR VC

Lisa Calhoun is Founder and Managing Partner of Valor Ventures, the first woman-led institutional venture capital firm in the U.S. South. For a decade, she has invested in over 40 B2B and AI startups at the first round across three funds, establishing Valor as a leading authority on applied AI in the South's expanding venture ecosystem. A Kauffman Fellow, Lisa has been honored as Atlanta Investor of the Year and one of Business Insider's Top 30 U.S. women early-stage investors. She is the co-author of Vic, Valor's proprietary AI investment platform. Lisa hosts the Signal South podcast and has spoken at Nasdaq, SuperReturn, KPMG, the Kauffman Leadership Summit, WPO, and Venture Atlanta. Her work connects investors with innovation opportunities across the South's booming economy.



JASON CAPLAIN

CO-FOUNDER & GENERAL PARTNER | BULL CITY VENTURE PARTNERS

Jason Caplain is Co-Founder and General Partner at Bull City Venture Partners, where he has been investing in early-stage software companies across the East Coast for more than 25 years. His notable investments and board roles include ChannelAdvisor (IPO), WeddingWire (merged with The Knot), Etix (acquired), and Contactually (acquired by Compass). Jason began his career in investment banking and consulting before joining Red Hat's finance team, where he served through its 1999 IPO. He currently serves on the boards of Levitate and Tiga AI and on the Investment Advisory Board for Virginia Venture Partners. Jason earned his B.S. in Finance from Bentley University and lives in Raleigh, North Carolina, with his wife and three children.



DANIEL CARPENTER

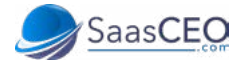
CO-FOUNDER & MANAGING DIRECTOR | RESURGENS TECHNOLOGY PARTNERS

Danny joined Resurgens in 2021 as a vice president and brings a wide range of investing and operating experience to the firm. Before joining Resurgens, Danny spent three years as a vice president at Primus Capital ("Primus"). At Primus, Danny focused on the healthcare and education technology sectors where he closed five platform investments and one add-on. Prior to Primus, Danny was an associate on the Business Operations / Finance team at Tesla where he partnered with construction and manufacturing teams to ramp production capacity while removing cost from the manufacturing process. Prior to Tesla, he was a consultant at McKinsey where he focused on helping companies across industries improve the efficiency of their supply chain, service operations, and manufacturing processes.

VICTOR CHENG

FOUNDER & CEO | SAASCEO.COM

Victor Cheng has spent close to 30 years advising technology company CEOs, boards, and investors; since 2021, his clients' exits total more than \$295 million. He is the author of *Teach AI Your Company* (2026), on turning the know-how a company runs on into enterprise value - a method he is applying to his own firm, teaching a multi-agent AI his advisory practice. A Stanford graduate, Victor began his career at McKinsey & Company and held senior operating roles at early software pioneers LivePerson and Art Technology Group (acquired by Oracle). Through SaasCEO.com, he guides software and technology-enabled services companies - and the investors who back them - from SaaS to AI-first. The goal: AI that shows up in the P&L, and an exit to institutional capital at a premium valuation.



FARHAD CHIKHLIWALA

CHIEF CLIENT OFFICER | HOW TO SAAS

Farhad is the chief client officer at How to SaaS, a Marketing Strategy Consulting firm, where he works with leading private equity investors and CEOs to drive enterprise value with marketing. As a consultant, marketing leader, and founder, Farhad has over a decade of experience helping companies generate demand and scale at speed.



BENZAMIN CHOI

CHIEF EXECUTIVE OFFICER | ALABAMA CAPITAL NETWORK

Benzamin Choi is Chief Executive Officer of the Alabama Capital Network (ACN), a Birmingham-based 501(c)(3) founded in 2017. ACN's mission is to increase access to capital for founders, support corporate innovation, and connect VC investors for the state. ACN's vision is to make Alabama the best place to build and invest in the USA. Benzamin moved to Birmingham four years ago from Orange County, California. He received his undergraduate degree from Boston University and MBA from The Johns Hopkins University. He loves to spend time with the Lord, his wife Steffany, and his newborn baby girl, Zoe Grace.





MITCH COLLERAN

CEO | JOIN IT

Mitch Colleran is a software developer, SaaS entrepreneur, and the founder of Join It, a membership management platform. With experience across product, engineering, and strategy, Mitch is particularly interested in how thoughtfully applying AI can create simpler, more effective technology that helps organizations build stronger, more connected communities.



CHRISTOPHER COLLINS

PRINCIPAL, EXECUTION BOSTON | PSG EQUITY

Chris Collins is a principal in PSG's Boston office. Previously, he was a vice president on Providence Equity Partners' valuation and strategic analysis team. Chris started his career in PwC's Deals practice. Chris received a Master of Business Administration from Harvard Business School and a Bachelor of Science in Finance from Bentley University. He is a CFA charterholder. At PSG, Chris leads investing efforts across vertical technology and fintech sectors. He currently sits on the boards of Dockwa, Order.co, PatientNow, LivTech, Portico, PreVeil and SignUpGenius. Other PSG investments Chris has worked with include DoseSpot (n.k.a. Interra Health), PlayMetrics, and Payrix.



CHRISTINE CONNOR

CO-FOUNDER & MANAGING PARTNER | SWITCH CONSULTING GROUP

Christine Connor is Co-Founder and Managing Partner at Switch Consulting Group, a transformation and change management consulting firm that helps organizations make complex change easier. She advises executives and private equity-backed companies on enterprise transformation, M&A integration, organizational design, change management, and the operating discipline needed to turn strategy into measurable results. Christine is known for bringing clarity to complex work, aligning leaders around decisions, and helping teams move from plans to sustained adoption. Before founding Switch, she worked in the Big 4 and mid-size consulting firms and ran operations at a startup. A Florida State University graduate, Christine lives in Atlanta with her husband and three children. Outside of work, she can usually be found planning her family's next adventure, cheering on her kids from the sidelines, watching Ted Lasso, or working her way through an ever-growing stack of books.

TIM COOL

FOUNDER & CEO | SMART CHURCH SOLUTIONS

Tim Cool is the founder and CEO of Smart Church Solutions, the developer of eSPACE software platform which includes Event Management, Work Order Management, Life Cycle Calculator, IoT Integrations, and other church facility management advisory services. Tim has assisted thousands of churches, throughout the United States with their facility needs including facility planning, facility condition assessments, as well as life cycle planning and facility management. Tim is also the author of several books including *Entrusted: A Guide to Intentional Church Facility Stewardship* and is a proponent of all things “Facility Stewardship.” Tim splits his time between Charlotte and the North Carolina High Country with his wife of 42 years, Lisa, and is the proud father of 30-year-old triplets along with two sons-in-law, one daughter-in-law, and three grandchildren.



MICHAEL CORKERY

CEO & FOUNDER | NEUROTEK CONNECT

Mike is the founder of NeuroTek Connect, a behavioral health technology company building infrastructure to connect people with better-fit specialized therapists and measure outcomes of care. The company begins with EMDR and trauma care, building on the 35-year history of NeuroTek Corporation, which has served more than 40,000 therapists worldwide. Before entering behavioral health, Mike built his career in financial technology and infrastructure, experience that shapes his approach to developing scalable healthcare solutions. He holds a degree in Finance from Canisius College. A Clearwater, Florida native, Mike is married with three adult children. Outside of work, he enjoys offshore saltwater fishing and college football. He especially enjoys connecting with entrepreneurs tackling complex problems where technology can create meaningful human impact.



NATALIE CORONA

PARTNER | PUZZLEHR

For over 15 years, Natalie has specialized in Human Capital Management, helping organizations align their people strategies with broader business objectives. As a partner at PuzzleHR, she works with business leaders to build scalable HR infrastructures, strengthen compliance, navigate employee relations, and adapt to evolving HR landscapes. Natalie also drives PuzzleHR's private equity channel, partnering with PE firms and their portfolio companies throughout the investment lifecycle. Her work focuses on supporting M&A integration, preparing organizations for strategic growth, and creating greater efficiency, consistency, and scalability across portfolio companies. Natalie lives in Atlanta, Georgia, with her husband and son. She enjoys traveling, reading, and watching her son play football and baseball.





MIKE COTTMAYER

FOUNDER & CEO | LIMINALARC

Mike Cottmeyer is CEO and Founder of LiminalArc, a fast-growing AI Transformation consultancy based in Atlanta, Georgia, working globally with mid-sized to Fortune 100 companies. Mike built LiminalArc around a top-down, strategically aligned system of transformation tightly integrated with an industry-leading system of delivery, paired with an engaging, iterative, bottom-up approach to leading change. The result is a pragmatic, metrics-driven approach focused on demonstrating tangible business value every step of the way, proven inside some of the largest organizations in the world. Mike brings more than 25 years of deep experience leading complex enterprise change, with a track record of turning bold strategy into measurable execution at global scale. He is a sought-after speaker on enterprise transformation, having delivered keynotes for audiences around the world.



AQUILINE

BRUCE CRABTREE

PRINCIPAL | AQUILINE

Bruce joined Aquiline in 2022 and is a principal at the firm. He was previously a vice president at Primus Capital Partners and an associate at Summit Partners, where he focused on the technology sector. Bruce began his career as an investment banker at Signal Hill (DC Advisory). His internship experiences include Susquehanna Growth Equity and PricewaterhouseCoopers. Bruce's portfolio companies include ClearCourse, Crunchafi, Fullsteam, onPhase and SurePoint. Bruce holds an MBA from The Wharton School of the University of Pennsylvania and a B.S. in Commerce from The McIntire School of Commerce of the University of Virginia.



transform9+

ALAN CREIGHTON

FOUNDER & CEO | TRANSFORM9

Alan is the founder and CEO of Transform9, a Birmingham-based healthcare technology company building AI voice agents for physician practices. Transform9 helps practices improve patient access by automating calls and complex front-office workflows, including scheduling, intake, messaging, and prescription refills. Alan founded and led Momentum Telecom, scaling the company to approximately \$95 million in annual revenue and more than \$13 million in EBITDA before guiding its transformation from a telecommunications reseller into a national cloud communications platform. A longtime Birmingham entrepreneur, Alan brings more than two decades of experience building technology businesses, navigating market shifts, and turning emerging technologies into practical solutions. Today, he is focused on making AI reliable, manageable, and valuable in real-world healthcare operations.

ROSS CROLEY

FOUNDER & CEO | GREATER SUM VENTURES

Ross Croley is the founder and CEO of Greater Sum Ventures, a growth-equity firm backing founder-led, tech-enabled services companies in the lower-middle market. A former software entrepreneur, Ross launched Ministry Brands in 2012 and scaled it to a \$1.4B valuation in under five years, earning PE Hub's "Deal of the Year" in 2017. Since then, he has led 300+ acquisitions at GSV, ranging from \$3M to \$800M, and has built multiple billion-dollar software platforms, including Community Brands, Inhabit, Government Brands (now Catalis), Tribute Technology, Therapy Brands (now Ensora Health), and Stax Payments. As a former operator turned capital allocator, Ross operates with a founder's urgency and an investor's precision, scaling category leaders through disciplined capital, sharp execution, and high-velocity growth.



MEG CROSBY

PRINCIPAL | PEOPLECAP ADVISORS

Meg Crosby is a board director, consultant, and best-selling author of *Running the Gauntlet: Proven Strategies for High Growth Leaders* (2025, Greenleaf Book Group). Meg works with high growth companies to help them build thriving sustainable organizations. Prior to founding PeopleCap Advisors, Meg honed her human capital management skills at Credit Suisse and Google. As a member of Google's People Operations Team, Meg worked closely with Corporate Development, Finance and Engineering to develop the cross functional M&A Integration Team responsible for Google's acquisitions. Meg is an operating partner with SSM Partners, a growth equity firm investing in healthcare in B2B businesses. She is the lead director and chair of the Compensation Committee for Diversified Trust Company, a comprehensive wealth management firm, and she also serves as a board member for Kukui, a SaaS platform serving the automotive industry. She previously served on the Board of Compass Data Centers.



ZACH CROWE

PARTNER | GUNDERSON DETTMER

Zach advises emerging tech and tech-enabled companies through every stage of their lifecycle, working with founders and leaders from formation through scale to exit (including with respect to day-to-day corporate governance, debt and equity financings, strategic transactions, and mergers and acquisitions). He also advises leading VC, growth equity and PE firms in connection with their investments into, and acquisitions of, tech and tech-enabled companies as well as representing their portfolio companies. He is known for providing his clients with practical, strategic advice to help them achieve their desired outcomes in an efficient manner. Before co-founding the Atlanta office of Gunderson Dettmer in January 2025, Zach spent 10 years at Morris, Manning & Martin. Zach lives in Atlanta with his wife and two young children.





JASON CUMMINGS

CORPORATE PARTNER | GUNDERSON DETTMER

Jason Cummings founded and currently leads the Atlanta office of Gunderson Dettmer. He advises fund and company clients in financing transactions (venture, growth and private equity), M&A (buyside, sell-side and bolt-ons) and corporate governance. Jason also represents management teams in sophisticated transactions. In addition to private practice, Jason was a partner at Arthur Ventures, an early growth equity firm, where he gained invaluable insight on funds and the business side of transactions. This dual perspective gives him an elevated understanding of how deals come together and are structured. Drawing on this combined expertise, Jason brings a highly commercial, solutions-oriented approach to client engagements, making him a trusted advisor to founders and funds. At his core, Jason enjoys working with founders and entrepreneurial fund clients.



EVAN CUMMINS

VICE PRESIDENT | WAVECREST GROWTH PARTNERS

Evan Cummins is a vice president at Wavecrest Growth Partners, having rejoined the firm in December 2025. Before returning to Wavecrest, he served as a vice president at Guggenheim Investments, where he led growth equity investments in B2B software companies. Earlier in his career, Evan worked as an associate at Wavecrest, contributing to new investment sourcing and providing hands-on support to portfolio companies. He began his professional journey at Guggenheim on the Technology team within the Corporate Credit group. Evan received an A.B. in Economics from Harvard, where he was a four-year member and one-time captain of the basketball team.



HUNTER CUSTARD

VICE PRESIDENT | ALABAMA CAPITAL NETWORK

Hunter is Vice President of the Alabama Capital Network (ACN), a Birmingham-based 501(c)(3) founded in 2017. ACN's mission is to increase access to capital for founders, support corporate innovation, and connect VC investors for the state. ACN's vision is to make Alabama the best place to build and invest in the USA. Prior to her role as vice president, Hunter served as Director of Membership, where she helped grow the organization and expand its reach. Hunter is originally from Pike Road, Alabama, and earned her undergraduate degree in business administration and finance from the University of Alabama.

ALEXANDER DASKALOFF

CEO | INCUBATORS.COM

Alexander Daskaloff is a serial entrepreneur, investor, and technology strategist who has built value from the ground up across multiple digital businesses. He started CardOffers.com, BuildOffers.com, BestCards.com, and FlexOffers.com, completing multiple successful exits. He is now the founder and executive chairman of Incubators.com, fueling the growth of many new ventures across FinTech, MarTech, ecommerce, media, and artificial intelligence. Alexander now focuses on creating, capitalizing, and accelerating next-generation businesses, technology, and teams centered around automation, data, and measurable performance. His interests focus on AI, automation, digital commerce, and disruptive business models that reshape established industries. Alexander brings an operator's perspective to investing - combining entrepreneurial experience, market awareness, technology, capital, and execution to turn ambitious ideas into scalable success stories.



TIFFANY DAVIS

DIRECTOR, INNOVATION DEVELOPMENT | ALABAMA POWER

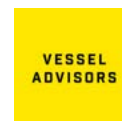
Tiffany is Director of Innovation Development for Alabama Power and has led innovation efforts since September 2022. Since joining Southern Company in 2005, Tiffany has held roles of increasing responsibility including serving as the assistant to the president and CEO and assistant to the EVP of Customer and Employee Services, supporting labor relations, human resources products and services, safety, wellness, health and disability management. Davis earned her MBA from Troy University and bachelor's degree (human resources concentration) from the University of South Alabama. She currently serves on the Vestavia Hills City Schools Foundation Board as past president/advisor and on Innovation Depot's Board. Tiffany resides in Birmingham, Alabama, with her husband, Desmond, and their two sons.



BRENNAN DE RAAD

FOUNDER & CEO | VESSEL ADVISORS

Brennan de Raad is the founder of Vessel Advisors, where his team of over 80 CFOs and Controllers provides fractional financial services and strategic guidance to startups and growth-stage ventures. With a deep understanding of software companies' unique capital requirements and unit economics, Vessel helps founders navigate fundraising, optimize burn rate, and build scalable financial models that attract venture backing. Vessel bridges the gap between raw product vision and investor-ready financial performance, working closely with founders, advisors, investors, and board members to drive sustainable growth. Brennan is based in Irvine, California with his wife of 17 years and four children. On evenings and weekends, you can find him driving his kids to club soccer, volleyball, golf, or surfing events, and sneaking in some Ducks hockey from the sidelines.





WILL DENTON

CO-FOUNDER & CHIEF EXECUTIVE OFFICER | CHANGEGUARD

I am the co-founder and CEO of ChangeGuard, a Birmingham-based construction software platform that cross-analyzes project documents to surface scope gaps, coordination conflicts, constructability issues, code violations, and more before they become costly change orders. After graduating with a building science degree from Auburn University, I went to work for a general contractor in Birmingham, where I saw firsthand how scope gaps and bad project documents resulted in lost time and margin. That experience led us to co-found ChangeGuard, where we are growing the company around deep roots in the Birmingham construction and business community and are focused on scaling our client base across the United States. Outside of work, I enjoy playing golf and investing time in building up the younger generation in their Faith.



JONATHAN DICKERSON

CO-FOUNDER & CEO | GUMPTION

Jonathan Dickerson is the co-founder and CEO of Gumption, a startup that efficiently sources competitive financing terms for commercial properties. Previously, Jonathan held various leadership positions at high-growth tech companies, including Future Capital and Bellhop. Jonathan earned an MBA from the Massachusetts Institute of Technology (MIT), and a B.S. in finance from Appalachian State University. He currently lives in Chattanooga, Tennessee.



TAYLOR DOHERTY

PRINCIPAL | GUIDEPOST GROWTH EQUITY

Taylor Doherty is a principal at Guidepost, which he joined in 2021. He focuses on originating, evaluating, and managing growth equity investments in the application software and data services sectors. Taylor began his career at The Parthenon Group (now EY-Parthenon), a management consulting firm, in the private equity practice. He then spent eight years in operating roles: as an early employee at Harry's, the direct-to-consumer men's grooming brand, where he worked in operations and corporate development, and later as co-founder of Highfive Brands, which incubated, acquired, and operated brands in the Shopify ecosystem. Taylor has an MBA from Harvard Business School and a B.S. in Economics from Duke University. He lives outside Boston with his wife and three children and enjoys reading and rooting for the Blue Devils.

GABRIEL DOTY

CO-FOUNDER & CPTO | CHIROHD

Gabriel Doty is Co-Founder and Chief Product and Technology Officer of ChiroHD, a healthcare technology platform built specifically for chiropractic practices. Founded in 2017, ChiroHD has grown from a single clinic in 2018 to serving more than 2,000 clinics nationwide. Gabriel has helped lead the company through multiple stages of growth, including its Series A funding in 2022 and partnership with Mainsail Partners in 2025. His background spans technology, product, and business, and today his focus is on building teams, developing leaders, and shaping the products and strategy that will drive the company's next stage of growth. Gabriel lives in Woodstock, Georgia with his two children.



LUKE DOTY

CO-FOUNDER & PRESIDENT | CHIROHD

Luke Doty is Co-Founder and President of ChiroHD, a comprehensive practice management and EHR system tailored for chiropractic professionals. A United States Marine Corps veteran and proud alumnus of the University of North Carolina, Luke has held diverse roles in software engineering, with experience in building and maintaining all parts of the technology stack. In 2017, he co-founded ChiroHD with his brother, Gabriel, and business partners, Jason and Vanessa Helfrich. Since joining ChiroHD full-time in 2022, Luke has continued his focus on driving technological innovation in the chiropractic industry. Luke lives in Greenville, South Carolina, with his two children and partner, Amber.



BRENT DROEGE

CEO | STANCIL CPA

Brent Droege is a Raleigh, North Carolina, based entrepreneur. His first business was landscaping - scaling that to \$17M revenue and \$4M EBITDA before exiting to a Morgan Stanley-backed landscaping platform. His second venture is partnering with CPA firms - generally buying out senior partners and then partnering with the junior partners in a very active management style. Stancil manages to team member satisfaction, client satisfaction, and cash flow, in that order. Brent has two partners in this venture, and is buying firms across the country. They really enjoy the space and are having a lot of fun doing it.





KEITH DUDLEY

CHIEF MARKETING OFFICER | ALTUS NOVA TECHNOLOGIES

As Chief Growth Officer of Altus Nova, Keith Dudley helps the company's positioning and go-to-market strategy keep pace with its portfolio's growth, translating a deeply technical value proposition into narratives that resonate with C-Suite buyers across multiple verticals. Altus Nova is an "outcome-obsessed" AI-powered value creation partner across the investment and business lifecycle, and Keith builds the messaging, collateral, and authority content that turn that value proposition into a repeatable sales engine - while driving the partnerships and event strategy that expand referral pipelines and executive visibility in key verticals.



ROBERT DUMAS

CEO | TAXCONNEX

Robert Dumas has over forty years of accounting and tax experience, the majority of which is in sales and telecommunications taxation. Robert worked in public accounting at Arthur Young and Grant Thornton and in industry at BellSouth Corporation. For the last thirty years Robert has been an entrepreneur in the sales and telecom tax compliance space founding and running two nationally-recognized sales tax compliance firms - Tax Partners and TaxConnex. Robert is a 1985 graduate of the University of Georgia's Terry College of Business with a Master of Accountancy and is a CPA. Robert has been married 45 years to Rene' and has two daughters and four grandchildren.



MATT DYAR

CHIEF OPERATING OFFICER | FAST SLOW MOTION

Every scaling company hits the same wall: the systems that got you here start to buckle, and AI adds noise instead of leverage. Helping leaders through that moment is what Matt Dyar does best. As Chief Operating Officer and Shareholder of Fast Slow Motion, a consulting firm helping 1,400+ clients grow and scale on Salesforce and HubSpot, Matt leads the firm's operational backbone across delivery, IT and security, HR, and go-to-market strategy - and FSM has begun offering AI services that turn enterprise AI from hype into measurable advantage. An Auburn MMIS graduate, Matt lives in the Birmingham area with his wife and three young princesses. Outside work, he can be found coaching and playing softball, soccer, and basketball with his kiddos.

ERIK ENRIGHT

CEO | THE PARASOL GROUP

Erik Enright is a SaaS operating executive with more than two decades of experience transforming founder-led software companies into highly profitable, market-driven organizations. He specializes in professionalizing operations, modernizing products, expanding markets, and creating enterprise value that culminates in successful exits. As CEO of The Parasol Group, Inc., Erik revitalized and modernized a battle-tested SaaS platform purpose-built for the staffing industry, deepening customer engagement and platform stickiness while leading the development and early launch of a new product line expanding into the broader HR technology market. Erik builds high-performing teams grounded in trust, accountability, work ethic, and integrity, aligning organizations around growth, profitability, and shareholder value. He has led two successful SaaS exits: Top of Mind, acquired by Black Knight, Inc. in 2021, and CardinalCommerce, acquired by Visa in 2017. He has also advised PTS Advance, acquired by Morson Group in 2025, and HUDDL3 Group, which acquired Enspira in 2024.



The Parasol Group, Inc.

MICHAEL ERWOOD

DIRECTOR | CHICK-FIL-A

Michael Erwood is a director at Red Wagon Ventures, Chick-fil-A's corporate venture arm, which builds and invests in businesses beyond its core restaurant business. He leads underwriting across the platform's investment activity and works primarily with founder- and family-owned companies seeking a long-term owner. Michael's background spans corporate and investment banking, corporate development, and operating leadership, including an executive role at an Atlanta-based startup. He lives in Atlanta with his wife, Graham, and their three daughters, and spends his time outside of work running, tackling home improvement projects, and getting outdoors.



DANIELLE FEITLER

INVESTOR – VICE PRESIDENT | INSIGHT PARTNERS

Danielle Feitler is a vice president at Insight Partners, where she focuses on leveraged buyouts and majority recapitalizations of application and infrastructure software companies. Since joining in 2021, she has worked with several portfolio companies, including Vector Solutions and PDI Technologies. Previously, she was a member of Goldman Sachs' TMT Investment Banking team. Danielle holds a degree in finance and Chinese from the University of Wisconsin-Madison. She lives in Manhattan and plays pickleball and cooks in her spare time.





SCOTT FERGUSON

CEO | AESTO HEALTH

"Ferg" brings 29 years as CEO in healthcare and technology to lead Aesto, a HIPAA-compliant data lifecycle management platform for PE-backed healthcare consolidation. Portfolio companies of KKR, Bain, Sverica, and other leading PE firms rely on Aesto to automate the most complex, risk-prone data integration processes post-acquisition. The Aesto platform currently archives 60 million patient records and supports 70,000 end-users across the industry's most demanding multi-site operators. Ferg is a Birmingham native, father of four, and ultramarathoner who recently climbed the equivalent of Mt. Everest's elevation in 33 hours.



ALEX FINLEY

CEO | LEADSONLINE

Alex is the chief executive officer of LeadsOnline, a trusted provider of data and intelligence tools to help U.S. and global law enforcement agencies advance their cases faster. LeadsOnline's technology enables investigators everywhere to recover stolen property, perform complex analytics, connect shootings, and support investigations from crime scene to courtroom. Today the company serves more than 5,000 law enforcement agencies in the U.S. and public safety organizations in more than 80 countries. Prior to LeadsOnline, Alex held several strategic roles in corporate finance in the U.S. and abroad. Alex played football and graduated from Harding University and later completed his MBA at Duke University. Alex and his wife, Tori, have three children and live in Texas.



BRETT FREVERT

FOUNDER & MANAGING DIRECTOR | CFO SYSTEMS

Brett Frevert is the founder and managing director of CFO Systems LLC, a premier Midwest leadership firm providing fractional, interim, project and recruiting services to organizations nationwide. He brings deep expertise in executive leadership, capital markets, mergers and acquisitions, team building, process improvement, cash flow optimization, and financial reporting. He is skilled at building high-performing finance and operations teams and translating complex financial information into clear, actionable insights. Known for calm, decisive leadership and a practical, 360-degree approach, Brett combines strategic vision, operational ability, and common sense to help organizations navigate challenges and drive meaningful results.

HOLLIS GIEGER JR.

EXECUTIVE DIRECTOR, ALTERNATIVE INVESTMENTS | MORGAN STANLEY

Hollis is a Certified Financial Planner (CFP®) with more than 40 years of experience advising high-net-worth families. After beginning his career as a CPA, he transitioned to financial services after recognizing a need to help entrepreneurs thoughtfully plan for and manage the wealth created through building and selling successful businesses. His accounting background provides broad tax and estate planning knowledge that continues to inform his customized approach to wealth management. Hollis also serves as an Alternative Investments Director at Morgan Stanley, a designation recognizing his experience in the field. He graduated from the University of Alabama, where he played on the university's golf team, and now serves on the President's cabinet. Outside of the office, Hollis enjoys playing golf and spending time with his wife, Karla, and two grown children.



Morgan Stanley

JEFF GOLDRICH

MANAGING DIRECTOR | RUNWAY GROWTH CAPITAL

Jeff joined Runway Growth Capital in 2022 as Managing Director, Technology, and has over a decade of experience lending to a wide variety of technology companies. Jeff's experience covers hundreds of transactions and relationships across a range of company sizes, stages, industry verticals, ownership structures, and transaction types. At Runway, Jeff leads efforts to invest \$10-100M+ of minimally dilutive capital into technology companies generating \$15M+ of revenue, to support management and other investors in growing their businesses and executing transformative acquisitions. Jeff holds a B.S. in Finance from the University of Illinois at Urbana-Champaign and an MBA from the University of Chicago Booth School of Business.



JACOB GORDON

DIRECTOR | RF INVESTMENT PARTNERS

Jacob Gordon serves as Director for RF Investment Partners, LLC. In this capacity, Jacob maintains responsibility for originating new investment opportunities, evaluating and structuring new transactions, and working alongside RF's management team partners to drive growth. Prior to RF, Jacob served as an investment professional at North Atlantic Capital, a Portland, Maine-based venture capital firm where he focused on investing in high growth SaaS and tech-enabled services businesses. Jacob was responsible for sourcing and evaluating investment opportunities alongside helping management teams with strategy, fundraising and sourcing talent. Jacob graduated cum laude from the University of Massachusetts - Amherst with an economics degree.





BRAD GRAY

PRESIDENT & CHIEF FINANCIAL OFFICER | DIVERSIFIED ENERGY COMPANY

Brad serves as Diversified Energy Company's President & Chief Financial Officer. Prior to this role, he served as Diversified's Chief Operating Officer and helped lead the company's growth through acquisition and led the successful integration of numerous multi-basin assets and companies. Prior to Diversified, he held senior financial and operational positions with Royal Cup, Inc., The McPherson Companies and Saks Incorporated. After graduating with a Bachelor of Science degree in Accounting from the University of Alabama, Mr. Gray began his career with Arthur Andersen LLP where he earned his CPA license. Brad is married to Nancy, his wife of 34 years, and he is the father of three adult children and grandfather of two grandchildren. He and Nancy enjoy traveling, family time, Alabama football and supporting numerous charities across Alabama.



DAVE GRAY

CEO | ARCORO

Dave Gray is CEO of Arcoro, a SaaS business backed by PSG Equity. He leads the strategic direction and growth of an all-in-one HR platform built for the construction industry. Previously, he was CEO of Daxko for over 15 years, growing the health and wellness SaaS business from an early-stage startup to market leader with 10,000+ customers and a team of 350. He led eight acquisitions and three private equity rounds, and Daxko delivered 15 straight years of double-digit revenue growth while earning repeat recognition nationally as a Great Place to Work. Earlier, Dave worked at Silicon Valley's Calico Commerce and in Grant Thornton's consulting practice in Chicago. Active in nonprofit and startup communities, he's an Auburn University graduate who lives in Birmingham.



TIM GREENFIELD

FOUNDER & MANAGING PARTNER | DEMOPOLIS EQUITY PARTNERS

Tim is the managing Partner of Demopolis Equity partners. He is an established business builder with a track record of driving above-market returns as an investment professional in the technology sector. He also has experience in successfully operating software companies. His career began at GE, completing their management program, has worked in consulting at McKinsey and Company, and has held numerous C-Level operating roles in technology companies, including serving as CRO and President of Mobile Payments for Net Element, helping take Net Element public on Nasdaq in a successful SPAC transaction, as well as President of Gold Mobile, a mobile software firm. Tim holds an MBA from the Kellogg Graduate School of Management at Northwestern University, a Master of Engineering from Northwestern University, and a B.S. in Mechanical Engineering from the University of Michigan.

BUBBA GRIMSLEY

FOUNDER & CHAIRMAN | LIBERTY RENT

Bubba Grimsley is the founder and chairman of Liberty Rent, a financial technology company that expands access to housing while helping multifamily properties convert more applicants into residents. After more than two decades as a trial lawyer, Bubba founded Liberty Rent to address a problem that couldn't be solved by litigation: applicants had the ability to pay but could not qualify for apartments due to damaged credit. Since 2014, Liberty Rent has partnered with thousands of properties and helped nearly 50,000 applicants secure homes. Bubba's work is grounded in the belief that a credit score does not define a person, and that businesses can create meaningful social impact while delivering measurable value to their customers.



DAN GROEN

MANAGING DIRECTOR, INVESTMENT-BUSINESS DEVELOPMENT | CLEARLAKE CAPITAL GROUP

Mr. Groen joined Clearlake in 2015. He leads Clearlake's business development team and is focused on sourcing technology investments. Prior to Clearlake, Mr. Groen was an associate director at HgCapital, focusing on leveraged buyouts in the technology, media, and telecommunications sectors. Before that, he was a founding member of the Draper Fisher Jurvetson Growth Fund, a fund within the DFJ affiliate network focused on later stage technology investments. Prior to that, he was an associate in the technology group at TA Associates and worked in the Technology Mergers & Acquisitions Group at Jefferies & Co. Mr. Groen was formerly on the Board of Directors of symplr and OnShift. Mr. Groen graduated with a B.A. in International Economics with an Accounting specialization and a minor in German from the University of California, Los Angeles.



SURESH GURSAHANEY

PRESIDENT & CEO | MICROAUTOMATION

Suresh Gursahaney founded MicroAutomation in 1991 and serves as the president and CEO. Under his leadership, MicroAutomation has become an industry leader in providing contact center and 9-1-1 solutions to the private and public sectors. Suresh also functions as Chief Architect for MicroAutomation. In his technical capacity, he provides direction for MicroAutomation's strategic products and initiatives and contributes to several NENA committees to help define the standards for Next Generation 9-1-1. Suresh received his bachelor's degree in electrical engineering and computer science from Duke University and earned an MBA from Carnegie Mellon University. Suresh has also completed Minority Business Executive programs at Dartmouth University and the University of Richmond. He currently holds five worldwide technology patents for his work with call center technologies.





JARED HALL

CEO & FOUNDER | INTELLIKID SYSTEMS

Jared is the founder and CEO of Intellikid Systems, an innovative SaaS company disrupting the Early Childhood Education space. He and his team have quickly grown the company into a major player in the industry with clients in five countries across three continents, all while rolling out three products to address the unique challenges facing the hundreds of thousands of child care centers worldwide. Having grown up in a family that founded one of the top 50 for-profit child care chains in the country, Jared honed his software skills over a decade in Europe, founding several successful technology companies. Jared resides in Las Vegas, where he also serves on the board of the Las Vegas Natural History Museum.



JOHN HALL

CHIEF ADVISOR | RELEVANCE

John Hall is the chief advisor for Relevance, a leading AI visibility agency that helps brands, products, and people appear in ChatGPT, Gemini, and other LLMs, helping them become the most relevant industry leaders. John founded Common Good Coworking for purpose driven leaders. He is the bestselling author of *Top of Mind* and speaks globally on AI trends and how brands can engage others to stay top of mind at the right moments. John was Senior Columnist at Forbes and Inc. Magazine and writes for Fast Company, CNBC, and HBR. He loves spending time with his wife and three kids having lake days together or working on non-profit causes.



MARC HARDGROVE

FOUNDER | CO8.AI

Marc Hardgrove is a visionary entrepreneur, growth strategist, and executive leader with more than two decades of experience founding, scaling, and acquiring companies in digital marketing, web hosting, and emerging technology sectors. As the founder and former chief executive officer of NextNet.ai and The HOTH, he has built and led high-growth organizations that have collectively generated more than a billion in revenue while earning industry recognition for innovation, operational excellence, and leadership culture. With a proven ability to transform early-stage ventures into scalable enterprises, Marc's career exemplifies the intersection of entrepreneurship, performance marketing, and corporate development. His leadership style emphasizes transparency, collaboration, and relationship-driven success.

TYLER HARPER

CO-FOUNDER | PATCHWORK LABS

Tyler Harper is Co-Founder of Homegrown Storage and Patchwork Labs, focused on modernizing the self-storage industry. Homegrown Storage acquires and operates self-storage facilities across multiple markets, while Patchwork Labs develops AI-powered technology to streamline the customer experience and day-to-day operations of self-storage facilities. The technology was originally built within Homegrown to help the company scale its rapidly growing portfolio with a lean, efficient operating model and has since evolved into a platform serving storage operators nationwide. Prior to founding Homegrown and Patchwork, Tyler worked in product at Groundfloor Finance and as an analyst at Pacific Lake Partners. He graduated from Georgia Tech with a degree in business and finance and a minor in engineering and business.



 **Patchwork Labs**

ANTHONY HAYES

PARTNER | MAINSAIL PARTNERS

Anthony Hayes joined Mainsail Partners in 2018 and is a partner on the Investment Team. He is responsible for sourcing and executing new portfolio investments. Anthony currently serves on the boards of Steelhead, CourtReserve, Flyntlok, ChiroHD, Skimmer, ProShop, ServiceCore, and Pilotbase. In 2022, Anthony served as Chief of Staff at ServiceCore. During his time at ServiceCore, Anthony helped the company build and monetize its websites and digital marketing product. Prior to joining Mainsail, Anthony was an investment banker at Bank of America Merrill Lynch in Palo Alto, California where he advised on transactions for public and private technology companies. Anthony graduated from Stanford University, where he earned a B.A. in Political Science and played on the varsity football team, winning two PAC-12 Championships and a Rose Bowl.



 **Mainsail Partners**

BRIAN HENLEY

FOUNDER & MANAGING PARTNER | RECURRING CAPITAL PARTNERS

Brian Henley is Founder and Managing Partner of Recurring Capital Partners in Austin, Texas. Recurring Capital provides growth capital to B2B software businesses and specializes in flexible debt financing. Recurring Capital has invested in over eighty growth-stage software businesses and is investing out of its fifth fund. Brian's career spans two decades of technology, entrepreneurship, and investing. After beginning his career with IBM in sales and corporate development, he founded several internet and software companies. Prior to founding Recurring Capital in 2016, he was EVP of Corporate Development and M&A for Upland Software (Nasdaq:UPLD). While at Upland, he completed multiple acquisitions and was a key member of the IPO team. Brian received a B.S. in Industrial Engineering from the University of Arkansas and an MBA from Harvard Business School.



 **RECURRING**
CAPITAL PARTNERS



CODY HILBUN

MANAGING DIRECTOR | BESPOKE CAPITAL

Cody Hilbun, CEPA®, PWA, is Managing Director of Bespoke Capital, a private wealth team serving successful entrepreneurs and privately held business owners before, during, and after major liquidity events. Cody and the Bespoke team have guided hundreds of owners through business transitions, helping them understand value, define what they need to net, and coordinate investment banking, tax, legal, estate, and personal financial planning before a buyer's timeline begins driving the process. Having helped build Bespoke from the ground up, Cody brings an entrepreneur's perspective to each engagement. He understands that a company is often far more than an asset - it is the owner's life's work, identity, family legacy, and path to financial independence. He is the author of *Before the Offer: The Business Owner's Exit Readiness Blueprint*. His guiding belief: a sophisticated buyer will arrive with a process, team, timeline, and strategy. The owner should too.



AARON HOFFMAN

CO-FOUNDER & CEO | DELIVERTHAT

Aaron Hoffman is Co-Founder and CEO of DeliverThat, an end-to-end delivery infrastructure platform that gives restaurant and catering brands greater control over fulfillment and the guest experience. Since founding the company with John Zinno in 2013, Aaron has grown DeliverThat into a partner serving more than 11,000 restaurant locations across the United States. A recognized voice in food technology and off-premise strategy, Aaron advocates for transparent, sustainable delivery models that protect restaurant profitability and brand control. He is a graduate of Ohio University, an avid golfer, and deeply interested in the agentic future of AI.



RICHIE HOWARD

PRESIDENT & CO-FOUNDER | ANGELTRAX

Richie Howard is a hands-on president and co-founder, monitoring and providing feedback in every facet of the business, from research and development to global operations. He brings more than 40 years of managerial and technological expertise to AngelTrax. Richie has successfully owned and operated multiple award-winning, technology-based businesses that are still operating throughout the United States today. He has also assisted in obtaining several U.S. patents. Richie earned a Bachelor of Science from Auburn University and played professional baseball, from 1976 to 1978, for the Atlanta Braves and the Pittsburgh Pirates organizations. With his leadership and experience in business growth, Richie has introduced AngelTrax to new markets, has expanded its international reach and is the company's visionary for future industry breakthroughs.

PETER INGE

CO-FOUNDER & CO-CEO | DEVCLARITY

Peter is Co-Founder and co-CEO of DevClarity. DevClarity helps PE-backed software companies adopt and implement AI coding tools. Prior to DevClarity, he served as CFO of NXTsoft, a PE-backed software company which he helped scale and exit, as well as an investor at Vulcan Value Partners and equity analyst at Barclays Investment Bank in New York.



KRISTIN ISAAC

CEO | STRUDEL

Kristin Isaac is CEO and Co-founder of Strudel, an AI company that embeds with customer teams to automate their most expensive, most painful workflows, freeing people for the moments only they can handle. Kristin brings two decades of go-to-market leadership, having scaled LinkedIn EMEA's account management organization from \$35M to \$75M in ARR and built ESPN Digital EMEA from the ground up to \$15M+ in revenue. She holds an MBA from Columbia Business School and a BBA in Accounting from the University of Wisconsin-Madison. A member of Chief, the network for senior executive women, Kristin is based in Madison, Wisconsin, where she and her co-founders are building Strudel. Outside of work, she's the oldest of three and still puts her early hustle to good use.



DREW JACKSON

CEO | STREETMETRICS

Drew Jackson is Founder and CEO of StreetMetrics, the measurement and intelligence layer for the out-of-home advertising industry. As advertisers demand more proof to defend their media spend, StreetMetrics captures OOH exposure and links it to audiences and outcomes, allowing media sellers to walk in with data and stories their advertisers believe. StreetMetrics measures over 250,000 billboards and over 100,000 vehicles across the US every day, generating roughly 40,000 data points per unit of inventory every month. Its SmartSearch platform leverages that data to help clients find, price and package inventory, and gives agencies and brands a way to plan their campaigns. StreetMetrics works with several of the largest out-of-home operators in North America. Drew earned his bachelor's degree from Samford University and enjoys building furniture when he needs time to think. He lives in Birmingham, Alabama with his wife and their two sons.





techstars

MATTHEW JAEH

MANAGING DIRECTOR | TECHSTARS

Matthew Jaeh is Managing Director of the Techstars Alabama EnergyTech Accelerator and Founder of ProctorU, an educational technology company that transformed remote assessment worldwide. Following his successful exit from ProctorU, Matthew began sharing lessons from his decade-long entrepreneurial journey by mentoring and supporting startups through Techstars. He also supports local economic development through the City of Pelham's Commercial Development Authority. An inventor with three patents, Matthew's honors include the 2019 ORBIE Award for Alabama CIO of the Year, Birmingham Business Journal's Top 40 Under 40, University of Florida's 40 Gators Under 40, and three consecutive Gator 100 awards. Outside of work, Matthew enjoys spending time with his family, competing in triathlons, playing music, and pursuing his passion for automobiles and motorsports.



Aprio

KENNY JANIS

MANAGER – TRANSACTION ADVISORY SERVICES | APRIO

Kenny Janis is a manager in Aprio's Transaction Advisory Services practice, where he advises private equity firms, strategic buyers, and founder-led businesses throughout the transaction process. Based in Atlanta, Kenny specializes in financial due diligence, helping clients evaluate financial performance, identify key business drivers, and better understand opportunities and risks surrounding a transaction. Kenny works closely with clients across a variety of industries, bringing a thoughtful and analytical approach to complex transactions. His experience includes quality of earnings analyses and supporting both buy-side and sell-side engagements. He also contributes to Aprio's broader M&A community through industry events, relationship development, and mentorship of emerging professionals. Kenny is a graduate of the University of Georgia and remains actively engaged in the Atlanta business and deal community.



**Dentistry
on Purpose**

PATRICK JARVIS

CEO | DENTISTRY ON PURPOSE

Patrick Jarvis, CPA, is Founder and CEO of Dentistry on Purpose, a healthcare technology firm engineering Revenue Cycle Management (RCM) and high-ROI automated roster management solutions for dental practices and dental support organizations (DSOs). Patrick founded the company to solve problems experienced by most dental practices by converting complex payer workflows into scalable, automated revenue engines. Dentistry on Purpose has scaled across more than 800 clinics nationwide, generating over 150,000 patient visits to date. The platform delivers immediate, proven financial returns: average savings of 14 labor hours per clinic daily and adds an average of 43.1 patient visits per clinic each month. Patrick has served as Chief Financial Officer for a 45-location multi-state DSO, an acute care hospital, and a regional physical therapy and rehabilitation group. Patrick lives in Pelham, Alabama, with his wife, Suzanne, and seeks to Love God & Love People every day.

ANDY JOHNSON

CEO | GREENCOURT

Andy is Co-Founder and CEO of GreenCourt and is also a member of the company's board of directors. He is responsible for company strategy, administration, capital structure, financial controls, and treasury management. Prior to GreenCourt, Andy led the Growth team at Systems & Methods, Inc. (SMI), an industry leader that provides financial and document management solutions to child support programs nationwide. To this day, he continues to work with SMI as an advisor to their board of directors. SMI has long and successful partnerships for SDU and/or debit card solutions, with 17 statewide child support programs across the country. Andy actively serves on the board of directors of the Alice's House Children's Home, the University of West Georgia Board of Trustees, and the Carrollton Athletic Booster Club and is an active member of Southern Hills Christian Church in Carrollton, Georgia. Andy earned a BBA in Accounting and an MBA from the University of West Georgia.



MACK JOHNSTON

PRESIDENT | BUSINESSLOANS.COM

Mack Johnston is President of BusinessLoans.com, a commercial lending marketplace and brokerage that connects small businesses with the capital they need to grow. Since inception, BusinessLoans.com has facilitated over \$3B in financing to small businesses. BusinessLoans.com earned a place on the Inc. 5000 for the second consecutive year, ranking No. 915 with 379% three-year growth. Prior to BusinessLoans.com, Mack ran finance for the portfolio of brands at Sovereign, a private family office. He began his career in small business lending at SnapCap, remaining through its acquisition by LendingTree. Mack holds a B.S. in Finance from the College of Charleston, where he ran Division I cross country.



JORDAN JONES

CONSULTANT | FIFTH LETTER

Through the time-tested lenses of the Enneagram and the Myers-Briggs Type Indicator, Jordan helps each of his clients understand what actually motivates their spouses, families, bosses, subordinates, and friends. Since 2012, Jordan has consulted with, coached, and taught hundreds of people how to leverage these personality frameworks to improve relationships, enhance corporate culture, and unlock the mysteries of human behavior. Jordan is also an attorney employed by the Florida House of Representatives. He lives in Thomasville, Georgia, with his wife and son, who is currently learning how to walk and throw a football at the same time.





IAN JULIANO

CEO | PARAGON HEALTH VENTURES

After nearly two decades in corporate development and stints as CFO and CEO of various SaaS companies, I launched Trella Health, a data analytics and care navigation company, in 2014. Today Trella has nearly 1,000 healthcare clients, from hospitals to hospices, and 200 employees. Trella was selected as a LinkedIn Top 50 startup in 2020, and has attained Modern Healthcare's Best Places to Work 7 years running. As Chairman of Trella, board member of Heart Legacy and President of Paragon Investment Holdings, my passion is helping promising tech companies develop sound strategies and successfully scale. I am forever grateful to those who helped me, and am always looking to return the favor. My roles as an acquirer, investor, executive and founder give me a unique perspective that I'm happy to share.



MORGAN KATZ

FOUNDER | TICKETNOLOGY

Morgan Katz is the founder and CEO of Ticketnology, a B2B SaaS and managed services company based in Texas. A well-known and respected veteran of the sports and entertainment ticketing industry, Morgan brings deep, hands-on experience as an event and ticketing professional. Ticketnology's flagship platform, Ticket Booth, helps season ticket holders and corporate clients manage, distribute, track, and resell their sports and entertainment season tickets. Under Morgan's leadership, Ticketnology has grown into a trusted partner for organizations looking to maximize the value of their season ticket investments while simplifying the operational complexity of ticket management. Morgan lives in Dallas, Texas with her husband and two children.



KEVIN KAYE

INNOVATION MANAGER | ALABAMA POWER

Originally from the Florida Gulf Coast, Kevin Kaye has called Birmingham, Alabama home for the last 25 years. His focus is on tech-based economic development by utilizing a mix of corporate venture capital being steered towards promising startups, and looking for commercialization opportunities to help companies find traction in their vertical. The majority of his attention is centered around ClimateTech, EnergyTech, WaterTech, Sustainability and any other vertical that may solve a pain point for Alabama Power, or one of its customers. Kevin lives with his wife, Dana, three young children, one family dog and whatever stray animal happens to wander by.

PATRICK KENT

CFO & CO-FOUNDER | DENTALOWL

Patrick Kent is Co-Founder and CFO of DentalOwl, LLC, an early-stage SaaS platform helping dental practices improve patient engagement and run a more effective front office. DentalOwl recently closed a fully subscribed pre-seed equity raise and is preparing to launch with Birmingham dental practices this fall. A CPA with more than two decades of finance leadership, Patrick helped build HospiceLink from startup to #160 on the Inc. 500, ultimately guiding the company to a \$440M exit. He has spent his career working with venture capital and private equity-backed businesses at every stage, from early growth through scaling, acquisition, and exit, serving in CFO and COO roles across healthcare, health tech, financial services, and logistics.



 **DentalOwl**

DAVID KESSLER

PRESIDENT & PARTNER | LEGISYM

David Kessler is Co-Owner and President of Legisym. He has over 29 years of experience in technology and business management. David began his career in database design, networking and application development. After transitioning to the ERP systems world, he spent the next 14 years working with supply chain systems primarily in the food industry. After serving in both executive sales and operational roles for several technology companies, he joined his business partners at Legisym in 2009. Since that time, the business has grown into the leading provider of SaaS based regulatory compliance solutions for pharmaceutical companies in the United States. David received a double major from the business school at Baylor University. He enjoys spending quality time outdoors with family and friends.



LEGISYM

ZUHAIR KHAN

PARTNER & CO-HEAD, BASECAMP FUND | BREGAL SAGEMOUNT

Zuhair Khan is a partner and co-head of Basecamp at Bregal Sagemount. He is responsible for originating and underwriting investments in the software, healthcare, financial technology, business services, and consumer services sectors. Prior to joining Bregal Sagemount he was a vice president on the Enterprise Technology Team at General Atlantic. Prior to General Atlantic, Zuhair was a policy advisor at the United States Department of the Treasury, and an associate at Madison Dearborn Partners. Zuhair began his career as an analyst at Evercore partners. Zuhair received an MBA from the Wharton School at the University of Pennsylvania, and a BBA in Business Honors and Finance, and a B.A. in History from the University of Texas at Austin. Zuhair lives in Brooklyn with his wife and son.



 **BregalSagemount**



TRENT KOCUREK

FOUNDER & CEO | EQUIP

Trent Kocurek is the founder and CEO of Equip, the software platform where care teams track service delivery, authorizations, and documentation, and participants engage through their own app, built into the way these organizations already work instead of layered on top. Trent started Equip because independence shouldn't depend on who's got the next shift, and today Equip partners with community rehabilitation providers, support coordination agencies, and universities nationwide to make that mission real. He lives in Hoover, Alabama, with his wife and three children (Sawyer, Oliver, and Isla).



ANAND KRISHNAN

CEO | THINKBRIDGE

Anand uses technology to help business owners and leaders reimagine what is possible. He founded thinkbridge, which designs, builds and runs business software systems using a productized services model. He is also a co-founder of SensorsCall, an agotech company, and ZPQV, a software factory platform company. He spent his high school and college years helping his family business and now specializes in working with family-owned companies. He worked at IBM for 18 years before founding thinkbridge. He has a bachelor's degree in Engineering from Bangalore University and an MBA from Emory University. He likes to hike with his family and play golf, though he is still working out why his bag needs 14 clubs. Anand lives with his wife and two sons in Marietta, Georgia.



CHRISTIAN KURTH

PARTNER | TIDEMARK

Christian Kurth is a partner at Tidemark and has more than a decade of experience helping build leading growth technology companies. He is currently a board director at AgVend and his other Tidemark investments include Jane and OneStream. Prior to Tidemark, Christian was a principal at JMI Equity (JMI), a growth equity firm, where he spent more than eight years investing in leading B2B software companies. While at JMI, Christian served as a board director for TimelyCare as well as a board observer for Jane, Canto, CipherHealth, and Jvion (acquired by Lightbeam Health Solutions). He was also involved with the firm's investments in Clío, PointClickCare, and Arena Solutions (acquired by PTC). Christian began his career on the Technology Investment Banking team at Wells Fargo Securities in San Francisco.

GARRETT KURT

FOUNDER & CEO | ONECLICK DATA

Garrett Kurt is the founder and CEO of OneClick Data, a property intelligence company helping insurers, contractors, and technology platforms make faster, more accurate decisions at the address level. Garrett began his career working on rooftops after Hurricane Ike in 2008, later founded a roofing company in Colorado, and earned his adjusting license, giving him firsthand experience on both sides of the claims process. That perspective led him to build OneClick around a simple problem: fragmented data and manual workflows make property repair decisions slower, less accurate, and harder to defend. Today, OneClick combines building codes, permits, property intelligence, weather, pricing, and estimating logic. Its North Star is answering a broader question across roofing, siding, windows, gutters, and more: “What should this project really cost?”.



BRAD LEVINE

FOUNDER & CEO | SYNERGIST TECHNOLOGY

Brad Levine is a technology entrepreneur and executive with more than 30 years of experience founding, scaling, and exiting software companies focused on regulated industries. He is the founder and CEO of Synergist Technology, an AI governance, compliance, and monitoring company serving government and enterprise organizations. Previously, he founded Tellus, a healthcare technology company, Blue Frog, a leading insurance transaction processing platform, and the Internet Broadcasting Company. In addition to his business leadership, Levine serves on the Board of Directors of the U.S. Department of Energy's Foundation for Energy Security & Innovation (FESI) and has held numerous public service roles in Florida, including chairman of the Florida Atlantic University Board of Trustees. He holds degrees from the University of Florida and Schiller University.



ANTHONY LIOCE

CHIEF OPERATING OFFICER | THE LIOCE GROUP

A Huntsville, Alabama native, Anthony Lioce is proud to carry on the legacy of The Lioce Group, a business founded by his grandparents in 1967. Mentored by his father, Nick Lioce, Anthony began his career in sales with TLG before earning an MBA and Master of Finance from Auburn University. Today, he helps lead the 96-person organization with a focus on growth, innovation, culture, and preserving the values that have guided the company for nearly six decades. Anthony is deeply committed to TLG's philosophy of “Doing the Right Thing,” and strives to lead with positivity, integrity, creativity, and encouragement while positioning the company for the next generation.





MATTHEW LIPPMANN

PRESIDENT & CEO | SPECTRUM ADVANCED

Matt Lippmann is the president and CEO of Spectrum Advanced, which holds three divisions: Fluoron (heat-shrink fluoropolymer roll covers and seamed sleeve technology), Aegis Advanced (high-performance industrial coating systems), and Radiant Cleaning Services (specialized industrial cleaning and surface preparation). An R&D-focused leader and product developer, Matt holds over 30 patents and continues to innovate on the fluoropolymer technology platform pioneered by his grandfather, Heinz Lippmann. He is currently focused on leveraging AI to build business tools that connect advanced coating technology with modern manufacturing, sales, and operations.



ROBERT LONG

FOUNDER & CEO | TELLERIX

Robert Long is Founder and CEO of TELLERIX, a leading technology partner helping credit unions nationwide modernize operations, optimize system integrations, and drive digital innovation. He also serves as Executive Vice President and CTO of Alabama ONE where he has led advancements in core system management, operational automation, and digital transformation, positioning the organization at the forefront of technology-driven financial services. Throughout his 30-year career in the financial sector, Robert has held leadership roles in technology and risk management at major banking institutions, launched a project management company, and co-founded a national data analytics firm. He earned his B.S. in Business Administration from Auburn University and is a graduate of the LSU School of Banking.



ALY LOVETT

PARTNER | RADIAN CAPITAL

Aly Lovett is a partner at Radian Capital. Prior to Radian, she was a principal at FTV Capital, and held roles at TA Associates, Centerview partners, and UBS Investment Bank. Aly holds a B.A. in Economics from Yale University. As a former college laxer, she now just tries not to get ejected from her children's sporting events.

WORTH LUMRY

DIRECTOR | RED WAGON VENTURES

Worth Lumry is Director at Red Wagon Ventures, Chick-fil-A's corporate venture arm, which builds and invests in businesses beyond its core restaurant business. Worth leads sourcing for Red Wagon Ventures, with an emphasis on identifying and building relationships with founder- and family-owned businesses that may be seeking a long-term owner. He has also held multiple operations and innovation roles across Chick-fil-A, Inc. He previously worked in management consulting with Deloitte Strategy & Operations and at a marketing technology startup that scaled and was acquired by Ticketmaster. Worth lives in Atlanta with his wife, Amy, and their four children and enjoys sports, travel, and making homemade barbecue.



AVERY MA

CHIEF PRODUCT OFFICER | INTELLIKID SYSTEMS

Avery is Chief Product Officer at IntelliKid Systems, a SaaS platform dedicated to early childhood education. He brings more than 15 years of experience driving digital transformation, data sophistication, cybersecurity maturation, and product innovation. In his previous role as Chief Technology Officer of Primrose Schools, he helped scale technology across more than 560 schools serving over 80,000 children. His leadership approach is shaped by his service in the U.S. Marine Corps, combining operational discipline with deep technology and leadership expertise. Throughout his career, Avery has focused on developing and executing technology strategies that drive business growth, organizational change, and operational efficiency. He earned his bachelor's degree in management with an emphasis in information systems from the University of Nebraska–Lincoln.



RICHARD MAKERSON

CEO & MANAGING PARTNER | BLUEFLETCH

Richard Makerson is CEO and Managing Partner of BlueFletch, an Atlanta-based enterprise software company focused on frontline technology and shared mobile devices. He has helped Fortune 500 companies across retail, healthcare, logistics, and manufacturing solve complex operational challenges. Before BlueFletch, Richard worked at Accenture, where he led large-scale mobile initiatives for the U.S. Postal Service. He is a graduate of Morehouse College and serves on several Atlanta civic boards, including Big Brothers Big Sisters of Metro Atlanta and Leadership Atlanta. Richard enjoys connecting with fellow entrepreneurs and technology leaders. Outside of work, he plays tennis and golf and enjoys snowboarding with his wife and two daughters.





JOEY MALONEY

PARTNER | NEXA EQUITY

Joey Maloney is a partner at Nexa Equity, a San Francisco-based growth equity firm he helped launch in 2021. Nexa invests in founder-led vertical B2B software and AI companies. At Nexa, Joey mostly focuses on companies serving the physical economy – supply chain, industrial, construction, field services, and govtech. Joey invested in and is a board member of Leap, Autura, Easy Metrics, Cedar AI, Facility Grid, and Ladle. He was previously at Luminate Capital Partners and, earlier, a technology investment banker. He graduated from the University of Southern California. Outside of work, Joey enjoys outdoor activities, including skiing, wake surfing, and anything at Lake Tahoe.



PETER MALUFF

VICE PRESIDENT | LEAD EDGE CAPITAL

Lead Edge Capital is a \$9 billion growth equity firm backing software, internet, and tech-enabled businesses around the world, with offices in New York, London, and Santa Barbara. Since 2011, the firm has partnered with over 100 companies and seen more than 60 successful exits. Lead Edge is powered by a global investor network of 700+ operators, executives, and entrepreneurs who help connect portfolio companies with the customers, talent, and advisors needed to accelerate growth. Peter is a vice president on the investment team, focused on sourcing and evaluating investments. Prior to joining Lead Edge in 2022, he worked at Founders Advisors in its sell-side technology investment banking group. He graduated from Auburn University and is a native of Birmingham, Alabama.



RICHARD MARADIK

CEO | CLARUS

Rich is CEO of Clarus, which provides patient communication technology to 2,000+ customers in the ambulatory clinic segment of healthcare. Clarus is wholly owned by Graham Holdings Corporation (NYSE: GHC). Prior to Clarus, Rich was CEO of NSight, a property management software business in the hotel industry. Nsight was acquired by Fullsteam in 2021. From 2006-2012 Maradik served as both Chief Marketing Officer and Chief Information Officer of Gaylord Entertainment (NYSE: RHP). He led the sales, marketing, revenue management and information technology functions. From 1995 to 2005, he was co-founder of SmartDM, a data management company with hundreds of clients in the travel and entertainment industry. In 1999, Inc. magazine recognized SmartDM as the "Best Company Started for \$1,000 or Less." The Acxiom Corporation acquired SmartDM in 2005.

BILLY MARSHALL

FOUNDER | SERVICETRADE

Billy Marshall is the founder of ServiceTrade, a SaaS platform that partners with commercial service contractors to deliver technology that enhances technician productivity, improves customer experiences, and drives scalable growth. Billy is a seasoned entrepreneur and technology executive who began his career at IBM and later founded rPath, where he raised over \$25 million in venture and strategic capital and established an A-list of customers including IBM, Fujitsu, and EMC. Billy is also an author and sought-after speaker on innovation, technology, digital marketing, and strategies for building more valuable commercial service businesses. He is the author of *The Digital Wrap* and co-author of *Money for Nothing*. Billy graduated with the highest honors in aerospace engineering from Georgia Tech and earned two master's degrees from MIT.



**SERVICE
TRADE**

BOBBY MARTIN

CEO & CO-FOUNDER | VERTICAL IQ

Bobby Martin is Co-Founder and CEO of Vertical IQ, a leading provider of industry intelligence insight for banks, CPAs, consultants, and advisors. Bobby spent seven years as a business banker in Wilmington, North Carolina before starting his first sales intelligence company. Through his experience leading and selling that company to a Fortune 500 firm, he's learned first-hand the challenges and solutions at each stage of entrepreneurial growth which has led to his 2016 book, *The Hockey Stick Principles*.



vertical IQ 

DANIEL MCDONALD

CEO | 86BORDERS

Dan McDonald is Chief Executive Officer of 86Borders, where he leads the company's mission to improve healthcare engagement and care coordination for underserved populations. With more than two decades of experience in healthcare strategy and operations, he focuses on helping health plans close gaps in care, improve quality performance, and better support members across Medicare Advantage, Medicaid, D-SNP, Marketplace, and Veteran populations.



 **86Borders**



MATTHEW MCFEE

CEO | INBOX MONSTER

Matt McFee is Managing Partner and CEO at Inbox Monster, a technology platform helping brands optimize email deliverability, performance, and customer engagement. A longtime entrepreneur and email industry veteran, Matt has extensive experience developing and bringing innovative marketing technology solutions to market. Prior to Inbox Monster, Matt was a founding partner of BriteVerify, where he helped build a leading email verification platform designed to improve data quality and help marketers reach their audiences more effectively. Throughout his career, Matt has focused on solving complex challenges at the intersection of technology, data, and digital marketing while building and scaling high-growth businesses. Matt earned his undergraduate and graduate degrees from the University of Rochester and resides in Charlotte, North Carolina.



CHRISTOPHER MCMULLAN

VICE PRESIDENT | ACCEL-KKR

Chris McMullan is a vice president at Accel-KKR. Prior to joining Accel-KKR, Chris was a vice president at Access Holdings, a middle market private equity firm focused on a variety of industries. Previously, Chris worked at TPG Sixth Street partners where he was involved with technology growth equity and credit investments. Chris was also an Associate at Summit Partners where he focused on sourcing, evaluating and executing late-stage growth equity investments in leading healthcare companies. Chris started his career in the consumer M&A advisory group at Harris Williams & Co. Chris received a B.S. in Business Administration with distinction from California Polytechnic University, San Luis Obispo.



KIRK MILLER

FOUNDER & CEO | DRAGONFLY ATHLETICS

Kirk Miller is the founder and CEO of DragonFly Athletics, a sports technology company serving the education-based athletics market. DragonFly's integrated platform unifies registration, eligibility, officiating, communications, compliance, governance, payments, and financial management for state associations, school districts, and athletic programs. DragonFly's mission is to become the system of record for education-based athletics – connecting every level of the ecosystem through integrated financial governance, trusted compliance, secure payments, and actionable data insights. The platform provides organizations with greater transparency, control, and accountability across both athletic operations and financial activity.

PATRICK MOONEY

CEO & OWNER | MPOWER BEVERAGE

Patrick Mooney is Co-Owner and CEO of InfoSolve, Inc., the company behind mPower Beverage Software, a point-of-sale software serving independent beer, wine, and liquor retailers. Over 19 years, Pat has run the sales and business side of InfoSolve and helped build mPower into a nationwide platform. Pat holds a degree in mechanical engineering from Texas A&M University. He and his wife, Annie, live in Dallas, Texas, with their three children, two of whom are currently at Texas A&M.



MARIO MOORE

CHIEF AI OFFICER | MCLEOD SOFTWARE

Mario Moore is Chief AI Officer at McLeod Software. He owns AI strategy across product, marketing, sales, and culture, pushing McLeod's logistics platform, used by 1,100+ transportation companies, to the front of the AI conversation. He's built this kind of thing before. Mario created the student retention software category in Higher Ed with GradesFirst, sold it to The advisory Board Company (now EAB), then moved into M&A; at Fast Slow Motion, sharpening an eye for what's worth building and what's worth walking away from. Off the clock, Mario's deep in Birmingham's special needs community and a regular on the Southeast live music circuit, following his sons' band from Birmingham to Baton Rouge to Nashville and every stage in between.



TOM MORRIS

CGO | PROCESSMINER

Tom Morris is Chief Financial Officer and Chief Operating Officer of ProcessMiner, the world's leading AI-powered platform for continuous manufacturing optimization. He leads the company's financial strategy and operations, drawing on more than a decade of experience in finance, accounting and operations. Tom holds a BBA in Accounting and Finance from the University of Georgia's Terry College of Business. A lifelong Atlanta native, he and his wife are raising four children, and they enjoy spending their free time playing sports and hiking with their family and friends.





KEVIN MOSLEY

CO-FOUNDER & GENERAL PARTNER | JURASSIC CAPITAL

Kevin Mosley is Co-Founder and General Partner at Jurassic Capital, a North Carolina-based early growth equity firm focused on growing B2B software companies in underserved regions. Jurassic uses a growth playbook honed by countless years in the trenches, focused on operational excellence to grow from ~\$5M to \$20M and create optionality for founders. Jurassic is currently investing out of a \$30M+ fund with seven investments and five active companies. Check sizes are \$1.5-3M initially and follow-ons include a strong base of operating advisors and LPs available to help. Kevin spent his pre-Jurassic career operating at growth-stage software companies in North Carolina. He graduated with a B.S. in Finance from Clemson and loves playing/watching all sports, especially golf and tennis.



DAAN MUTSAERS

PARTNER | BESPOKE CAPITAL

Daan Mutsaers is a partner at Bespoke Capital who works primarily with successful, privately held business owners. As a CERTIFIED FINANCIAL PLANNER™ professional and Certified Exit Planning advisor, he helps owners become financially independent from their businesses and prepare for decisions that can shape their families, companies, and legacies. His work includes evaluating how a business fits within a broader financial plan, preparing for future transactions, and coordinating tax, estate, charitable, and investment strategies. Daan believes preparation should begin well before a business is brought to market, giving owners greater clarity, flexibility, and opportunity. Originally from the Netherlands, Daan now lives in the Atlanta area with his wife, Maddie, and their daughters, Rosie and Cece. Outside of work, he enjoys basketball, fishing, hiking, and football.



CASEY MYERS

CEO | 120WATER

Casey Myers is CEO of 120Water - a data management platform that brings state agencies and utilities together for water quality and asset compliance. 120Water connects water utilities and regulators in one shared system, standardizing water data and requirements into compliant reporting and community communications. With more than 25 years of leading and scaling high-growth software companies, Casey brings deep vertical-SaaS and growth-stage experience coupled with relevant domain expertise in the public sector and utilities. Before becoming CEO of 120Water, he was a partner at Edison Partners, a ~\$3B AUM lower-mid-market growth equity firm, where he owned Edison's value creation and portfolio operations. Earlier in his career, he led strategy and corporate development at SundaySky, helping execute a \$100M+ private equity exit, and grew Exstream Software's public sector business fivefold before its acquisition by HP. He's based in Atlanta, Georgia.

SHIV NARAYANAN

CEO & FOUNDER | HOW TO SAAS

Shiv Narayanan is the founder and CEO of How To SaaS, a management consulting firm that works with leading private equity investors, founders, CEOs, and marketing leaders. As an advisor, consultant, and fractional CMO, Shiv has helped B2B companies create hundreds of millions of dollars in enterprise value with marketing and demand generation. He is also the bestselling author of *AI Marketing Blueprint*, *Post-Acquisition Marketing* and *Exit-Ready Marketing*, and the host of the Private Equity Value Creation Podcast.



ALLISON NETTO

SENIOR VICE PRESIDENT | CAC SPECIALTY

Allison Netto is Senior Vice President at CAC Specialty, part of The Baldwin Group, focusing on business development efforts across a broad range of insurance solutions. By leaning on her M&A and business experience, Allison shines a light on the complex work and world-class outcomes that CAC achieves for its clients. Previously, Allison led business development efforts for the escrow and payment services team at Western Alliance Bank, practiced law at Hogan Lovells, and was in-house counsel at an Atlanta-based fintech company. Allison received her JD from Benjamin N. Cardozo School of Law in New York City and her B.A. from Rollins College. Allison is NYC-based and resides in Darien, Connecticut, with her husband Mike and two children, Nora and Nico.



SHEGUN OTULANA

FOUNDER & CEO | HARMONY VENTURE LABS

Shegun Otulana is a serial entrepreneur, investor, and Founder of Harmony Venture Labs (HVL), a venture studio dedicated to launching and scaling technology companies that drive innovation and create lasting impact. Originally from Nigeria, Shegun moved to the U.S. to study at UAB, where his early passion for technology and business took root. In 2013, he founded TheraNest, a tool for mental and behavioral health providers. That business grew into Therapy Brands. In 2021, Shegun exited Therapy Brands in a \$1.25 billion transaction. Today, through HVL, Shegun supports founders and builds innovative companies, including Copysmith AI, an AI-powered content creation startup where he serves as CEO. He lives in Birmingham, Alabama, with his wife and four children.





DAN PALAY

CEO | KPI SENSE

Dan Palay is CEO of KPI Sense. There, he leads a team that provides financial analytics for growth-stage software businesses, building on KPI Sense's legacy as a leading provider of FP&A services for the SaaS industry. With experience across marketing, investing, and consulting, Dan loves working with clients to see the patterns in their own data that help tell their companies' most important stories. Dan holds a B.A. from Tufts University and an MBA from the University of Southern California. He resides in the Chicago area with his wife and two children.



ALEX PANOSIAN

CEO | STARTGUIDES

Alex Panosian is CEO of StartGuides, a defense technology company delivering Performance Support Applications to the U.S. Army, Marine Corps, and Special Operations Command. StartGuides builds software that puts critical operational knowledge in the hands of soldiers at the point of need - anchored by MATrIX, its distribution and assessment platform, and PageForge, its proprietary authoring engine. The company has developed solutions for hundreds of military systems and deployed them broadly. Alex is also principal of Charles William Growth Partners, a family investment holding company he built with his father spanning self-storage, lower-middle-market private equity, and LP investments. Before StartGuides, Alex served as an Army officer, including a deployment to Afghanistan, and later worked at McKinsey & Company. He is a graduate of West Point and holds an MBA from the University of Chicago Booth School of Business.



DAVE PARKER

FOUNDER & CEO | TRAJECTORY NETWORK

Dave Parker is the founder of Trajectory (GetTrajectory.com), where he helps lower-middle-market and innovation-economy founders get exit-ready, preparing the business so the process runs cleaner and the outcome is stronger for everyone at the table. He's a six-time founder who has sold three of his own companies and been part of 20+ exits as a founder, board member, operator, and advisor, and previously served as CEO of the Entrepreneurs' Organization (EO), a global nonprofit of 20,000 member companies across 87 countries. He's a graduate of the University of Washington. A Washington native, Dave lives in Woodinville, Washington with his wife and labradoodle. Outside of work he's usually playing golf or cycling, and he'll happily talk your ear off about how AI can help founders exit better.

JASON PARRISH

CO-FOUNDER & GENERAL PARTNER | ALTUS NOVA TECHNOLOGIES

As Co-Founder of Altus Nova, Jason Parrish helps leadership teams turn business strategy into measurable outcomes through disciplined discovery, clear roadmaps, and high-trust execution. Altus Nova is an “outcome-obsessed” AI-powered value creation partner across the investment and business lifecycle: aligning stakeholders, de-risking decisions, and ensuring tech investments translate into scalable operations, defensible strategy, and momentum.



JOEL PATTERSON

FOUNDER & FORMER CEO | THE VESTED GROUP

Joel Patterson is the founder and former CEO of The Vested Group, a business and technology consulting firm he built in the Dallas, Texas area. He began his consulting career at Arthur Andersen and Capgemini before helping found Lucidity Consulting Group in 2001, and later founded The Vested Group in 2011 with the small-to-medium market in mind. Under his leadership, the firm brought comprehensive cloud-based business management solutions to start-ups and well-established businesses alike, helping clients thrive through hands-on strategy, technology, and operational support. Having successfully sold the business, Joel is now focused on building relationships with founders, investors, and executives while looking to leverage his operating and consulting experience to help growing companies scale, strengthen their operations, and position themselves for a successful future exit.



MATT PAVLICK

FOUNDER & FORMER CEO | GRO MARKETING

Matt Pavlick is the founder and former CEO of GRO Marketing, a digital marketing agency he grew from startup to one of the nation's leading firms serving the student housing and multifamily industries. Under his leadership, GRO earned four consecutive appearances on the Inc. 5000 before being acquired by OuterBox in 2026. A recipient of the H. Pettus Randall Entrepreneur of the Year Award, Matt now advises startups and entrepreneurs navigating growth, leadership, and the difficult decisions that shape both a company and its founder. He is also a frequent guest speaker at Alabama colleges, where he shares candid lessons on entrepreneurship, building teams, and the realities of business ownership. Matt lives in Tuscaloosa, Alabama, with his wife, Katie, and their sons, Charlie and Max.





LARRY PIRKLE

MEMBER, AUDIT | WARREN AVERETT

Larry Pirkle is a member in Warren Averett's Audit Division and serves as the firm's Technology & Life Sciences Industry Group Leader. With more than 30 years of experience, he advises technology and software companies ranging from startups to established organizations. Larry has extensive experience in financial reporting, software revenue recognition, mergers and acquisitions, due diligence and equity transactions. He works closely with founders, executive teams and investors to help businesses navigate growth, operational challenges and strategic opportunities. Larry lives in Birmingham with his wife and son.



DAN PISTONE

SENIOR MANAGING DIRECTOR | WESTERN ALLIANCE BANK

Dan Pistone currently serves as Senior Managing Director and Group Head of Sponsor Finance at Western Alliance Bank. He brings more than 30 years of banking experience, including 23 years with Western Alliance. In 2004, Dan launched the bank's Innovation Banking business and subsequently built multiple industry verticals, including Renewable Resource Group, Solar Tax Equity Investments, Life Sciences, and Equity Fund Resource Group. Today, the Sponsor Finance business exceeds \$3 billion in loans. Under Dan's leadership, these teams have been recognized as top-quartile groups within their respective industries, delivering strong financial performance and best-in-class credit results. Dan excels at building high-performing teams and has a proven track record of cultivating strong internal and external relationships. He is a balanced banker who consistently delivers strong financial results within defined strategic and risk parameters.



NATE PURDUM

DIRECTOR | KOCH DISRUPTIVE TECHNOLOGIES

Nate Purdum is a Director at Koch Disruptive Technologies (KDT), Koch Inc.'s venture capital and growth equity business. He partners with each of Koch's global companies, KDT portfolio companies, entrepreneurs, and business leaders to drive growth through strategic partnerships and commercialization. During his 15+ years with various Koch companies, Nate has held leadership roles across venture investing, technology partnerships, supply chain, procurement, and market risk. Nate is a graduate of Wichita State University, where he earned degrees in economics and international business. Originally from Norfolk, Nebraska, he now lives in Wichita, Kansas with his wife, Sarah, and their two children.

DANIELLE PUTNAM

CEO | THE NEW FLAT RATE

Danielle Putnam is CEO and Co-Founder of The New Flat Rate, a technology company providing menu-based pricing solutions for residential home service contractors. Growing up in a family of contractors, she has spent much of her career helping HVAC, plumbing, and electrical businesses improve profitability, strengthen operations, and create better customer experiences. Danielle is a recognized leader and advocate for the trades, and a frequent industry speaker, sharing her experience in leadership, business growth, pricing strategy, and advancing career opportunities within the skilled trades. She is a past president and current Advisory Board member of Women in HVACR, serves on the board of the EGIA Foundation, and has been recognized as a Top 40 Under 40 by The ACHR NEWS and as Service World's Woman of the Year.



THE **NEW**
FLAT RATE

CHRISTOPHER RAND

CEO | ANGELEYE HEALTH

Christopher Rand is Chief Executive Officer of AngelEye Health, where he has led the company's mission to strengthen connections between neonatal and pediatric intensive care units (NICUs/PICUs) and families through cutting-edge engagement technologies since 2019. Under his leadership, AngelEye has grown rapidly: expanding its hospital partnerships, tripling revenue, and introducing solutions like CameraSystem, MilkTracker, NICU2Home, and EDNA for risk identification. Rand holds an MBA from Vanderbilt University's Owen Graduate School of Management and a Bachelor of Business Administration in Accounting from the University of Notre Dame. Before AngelEye, he held roles spanning venture development, technology ventures, and finance, including as Managing Director at Tri-Star Health Partners and Senior Associate at Standard & Poor's.



AngelEye 
HEALTH

TATUM REZIN

CEO | LIBERTY RENT

Tatum Rezin is CEO of Liberty Rent, a tech-enabled platform that helps multifamily operators increase lease approvals while maintaining resident quality. Since joining in 2024, she has repositioned the company and invested in its technology and data capabilities to support its next stage of growth. Previously, Tatum led the \$1B Fingerhut business through its post-bankruptcy turnaround, delivering three of its most profitable years on record. As President of HALO Innovations, she doubled revenue and EBITDA over four years and led the integration and turnaround of sister company aden+anais. Throughout her career, Tatum has specialized in turning around and scaling middle-market businesses, building stronger teams and capabilities, and creating enterprise value. She holds a B.S. and MBA from the University of Minnesota.



 Liberty
Rent



JOSH ROBERTS

SENIOR CREDIT OFFICER, SPONSOR & SPECIALTY FINANCE | WESTERN ALLIANCE BANK

Josh is Senior Credit Officer with Western Alliance Bank, where he was previously Co-Head of Technology Sponsor Finance. Before joining Western Alliance in 2022, Josh co-founded and led technology banking practices for CIBC Bank and Webster Bank. Previously, Josh was an investment banker with Wells Fargo Securities, RBC Capital Markets and Truist Securities, where he covered the enterprise software, tech-enabled services, fintech and media and communications sectors. Prior to banking, he worked in corporate accounting, treasury and M&A. Josh earned a B.S. (Finance) from the University of Illinois at Urbana-Champaign College of Business (Gies) and an MBA (Finance, Accounting & Strategic Management) from the University of Chicago Graduate School of Business (Booth).



JOHN ROMAN

CO-FOUNDER & CEO | BATTLBOX

John Roman is the CEO and co-founder of BattlBox, the outdoor adventure brand that pioneered its category. With a fiercely loyal membership, a massive social following, and a rapidly expanding live commerce operation, plus new ventures like BattlGames, BattlBox has built a dominant omnichannel presence at the category's summit. John has steered the brand through a Netflix original series, a sale to private equity in 2021, and a founder-led buyback in 2023 that returned BattlBox to founder control. Since then he has pushed the brand into live commerce, Amazon, and BattlGames, growing revenue and community at a pace the rest of the category is still chasing.



JASON ROUTSON

FOUNDER & CEO | CIRCOOL

Jason Routson is the founder and CEO of Circool, a Birmingham-based software company with a simple mission: help schools better protect their students, staff, and communities. The idea for Circool started when Jason discovered that groups of people were being allowed into his son's school without being properly screened. Rather than simply raise the issue, he decided to build a better solution. What began as a parent trying to make his own child's school safer has grown into a rapidly scaling K-12 technology platform serving school districts across multiple states. Circool has grown into a connected platform for managing who is in a school, who is leaving, where students are moving, and how schools respond when it matters most. Jason's focus is on building a category-defining software company from Birmingham around a problem he believes is worth solving.



BRIAN RUSSELL

VP, PRICING STRATEGY | MAINSAIL PARTNERS

Brian is Vice President of Pricing Strategy at Mainsail Partners. He has over a decade of experience developing and implementing pricing strategies that help scale software businesses and works closely with Mainsail's portfolio companies to optimize their product pricing and packaging. Prior to joining Mainsail, Brian was Head of Pricing Strategy at Zuora, a SaaS vendor that provides quote-to-cash solutions for subscription businesses. Before joining Zuora, he held pricing and product leadership positions at Workday and Webex. At Workday, Brian focused on developing SaaS pricing and packaging strategies for new product launches and new go-to-market initiatives. At Webex, Brian led pricing strategy for their collaboration SaaS products across both sales-led and product-led growth portfolios. Brian has a B.A. from George Mason University and an MBA from Indiana University's Kelley School of Business.



MELISSA RYAN

FOUNDER & CEO | ASURETI

Melissa Ryan founded Asureti and has led the governance, risk, and compliance (GRC) consulting firm for ten years. Her 25+ years of consulting and operational experience span financial services, insurance, energy, healthcare, engineering, legal services, and technology. She builds enterprise programs from inception, then translates them across business, IT, and strategy in risk-based language leaders act on. Before Asureti, she built and led audit and GRC programs for a US public company's global operation. She also advised clients on strategy, risk, and process improvement at Deloitte and Grant Thornton. Melissa is also founder of KubernoGRC, where she is building an AI-powered compliance orchestration platform for mid-market risk and compliance teams. She carries P&L, product, and market development responsibility across both ventures.



DOUG SABELLA

CO-FOUNDER & CEO | PAYROLL INTEGRATIONS

Doug Sabella is the co-founder and CEO of Payroll Integrations. He leads an organization that strives to streamline the benefits and finance workflows of enterprises and their clients through Payroll Integrations' industry leading Unified Payroll API. Prior to founding Payroll Integrations, Doug was a product leader at Salesforce delivering solutions for their AppExchange, the world's largest B2B app marketplace. On the weekends, he enjoys hiking and going to the beach with his wife, sons, and two dogs. Doug holds a bachelor's degree in economics from Loyola Marymount University.





INDU SANKA

CEO | RED ELEPHANT



Indu Sanka is the CEO of Red Elephant, a nationally recognized design and architectural signage company serving commercial properties across Texas and neighboring states. A visionary entrepreneur and strategic leader, she has guided the company's exceptional growth, earning recognition on the Inc. 5000 and Dallas 100 lists. Prior to leading Red Elephant, Indu built a successful consulting career working with major brands, bringing expertise in business strategy, finance, and customer experience. She holds an MBA in Corporate Finance and Business Analytics from Southern Methodist University, where she graduated as valedictorian. Originally from India, Indu is passionate about empowering women entrepreneurs, fostering meaningful partnerships, and driving innovation. Outside of work, she enjoys yoga, meditation, and spending quality time with her family.



SCOTT SCHAEDEL

CEO | QUORE



Scott Schaedle is the CEO of Quore, a hotel technology company he founded in 2012 to provide the first cloud-based service optimization solution to the hospitality industry. While working as a hotel engineer, he saw a need to improve the day-to-day operations. He created the initial versions of Quore after hours and tested them during his shifts at the hotel. Fueled by his hospitality heritage and design expertise, he created a product that seamlessly blends functionality with aesthetics. Under Schaedle's leadership, Quore surpassed its three-to-five-year plan in the first three months of business and now has more than 125,000 users at 7,500+ hotels worldwide.



KELLY SCHRAD

FOUNDER & CHAIRMAN | DATAVIZION



Kelly Schrad is an entrepreneur, business advisor, and founder of DataVizion, a technology services company he built over more than 25 years. Today, he serves as chairman while focusing on strategy, partnerships, acquisitions, and long-term value creation. Kelly also founded The Owners Advisor, helping business owners build stronger, more valuable, and less owner-dependent companies. A father of five, Kelly is a staunch conservative Christian whose faith, family, and belief in servant leadership shape how he approaches business and life. Outside of work, he enjoys boating, scuba diving, and country music. Kelly believes business is ultimately about stewardship - developing people, creating opportunity, serving others, and building organizations that make a lasting impact.

MAX SCHUETZ

CEO | KISI

Max Schuetz is the co-founder and CEO of Kisi, a security and space management technology company used by organizations in more than 50 countries. Max started his career at EGYM when the fitness technology company was just five people, giving him an early look at building and scaling a technology business. In 2012, he co-founded Kisi with a mission to connect people and spaces. Max holds a master's degree from the London School of Economics and is originally from Bavaria, Germany. Outside of work, he enjoys golf, surfing, and competing in cross-country ski races.



JOHN SCIARABBA

FOUNDER & CEO | ALDEN SYSTEMS

John Sciarabba is the CEO and founder of Alden, a software company transforming utility infrastructure management. John is a proven leader with a vision for scalable, impact-driven innovation. Under his leadership, Alden's centralized SaaS platform has dominated the market, managing over 60 million joint use assets across 58 states and territories. The software automates permitting, invoicing, and compliance workflows for electric utilities and broadband providers, delivering measurable gains in efficiency, transparency, and ROI. Alden ONE's real-time insights support smarter financial decisions and safer infrastructure. Based in Birmingham, Alabama, John enjoys outdoor activities, mentoring aspiring entrepreneurs, and exploring emerging technologies. Known for his collaborative leadership and commitment to excellence, John is building solutions that strengthen communities and drive industry-wide transformation.



alden

DAVID SETZER

FOUNDER & CEO | MAILPROTECTOR

David Setzer is Founder and CEO of Mailprotector, the only Zero Trust email security, encryption, and compliance platform delivered exclusively through a network of global IT partners. He resides in Greenville, South Carolina where he and his wife, Kristin, are raising their five children. In addition to his work with Mailprotector, he and Kristin have spent the last 30 years coaching and mentoring entrepreneurs in former communist Eastern Europe. David has been active on the boards of Greenville Technical Charter High School, NEXT Start, and Clemson University's Spiro Center for Entrepreneurial Research. He is a graduate of the Moore School of Business at the University of South Carolina where he served as president of the Fellowship of Christian Athletes.





BRYAN SHAVER

FOUNDING PARTNER & PRESIDENT | BUILDINGREPORTS

Bryan is Founding Partner and president of BuildingReports, the fire and property protection industry's leading provider of verified, device-level inspection compliance reporting. BuildingReports pioneered mobile and cloud-based technology to digitize inspection data, improving accuracy, accountability, and efficiency across the industry. Its service members form the world's largest network of inspection providers, having completed more than 16 million inspections covering over 30 billion square feet of inspected space. The company continues to expand through strategic investments in adjacent industries - one of which reached a successful exit this past year - along with international market development and training programs such as the Inspectors Boot Camp. With active growth across North and Latin America and Europe, BuildingReports remains focused on making compliance provable at the device level.



GREYLION

JODY SHECHTMAN

PARTNER | GREYLION

Jody leads business development for GreyLion, which includes the origination and evaluation of investment opportunities across several sectors including software and tech enabled services. She is a member of GreyLion's investment committee and maintains an active role supporting existing portfolio companies. Prior to GreyLion, Jody was a managing director at Perella Weinberg Partners serving the same role as part of the PWP Growth Equity team since 2012. Previously, Jody worked in Investor relations and marketing for HealthCor Management, L.P., a global healthcare-focused hedge fund and private equity firm, which raised over \$3.5 billion during her tenure. Jody holds a B.A. in Political Science from Washington University in St. Louis and an MBA from NYU Stern School of Business. She was born and raised in NYC where she currently lives with her husband and two children.



JANE SIDLER

CEO | ACCELERATED CLAIMS

Jane Bray Sidler, MBA is the chief executive officer of Accelerated Claims, where she leads strategic growth, innovation, and operational excellence for one of the nation's leading complex claims management organizations. With a background spanning finance, technology, analytics, and executive leadership, Jane is passionate about leveraging data and automation while fostering a people-first culture. She holds an MBA from Liberty University and is recognized for building high-performing teams and driving meaningful organizational transformation. Outside of work, Jane is dedicated to giving back through charitable organizations that create opportunities for children and families. She enjoys mentoring emerging leaders, supporting community initiatives, and spending time with family while cheering on her beloved Georgia Bulldogs.

DAVID SIEGEL

PARTNER & TECHNOLOGY INDUSTRY LEADER | APRIO

David is the technology industry leader and an audit partner at Aprio, where he leads the 500-person team serving technology clients around the globe. He performs audits of privately held, multinational tech companies at every stage, from pre-revenue startups to mature, private equity-backed roll-ups. A highly engaged leader with a strong pulse on the fast-moving technology industry, David is attuned to emerging trends and helps clients navigate growth and change with clarity and foresight. He brings deep knowledge of the accounting issues that shape tech companies: revenue recognition, complex equity compensation, acquisition accounting, and shifting regulatory requirements. At Silicon Y'all, David will share what he's seeing across the technology landscape and how founders and finance leaders can Account for Anything™ that comes their way.



Aprio

ANDREW SINCLAIR

FOUNDER & CEO | LANE FOUR

Andrew Sinclair is the founder and CEO of Lane Four, a boutique RevOps consultancy that helps high-growth technology companies scale their go-to-market operations across Salesforce and HubSpot. A Salesforce architect by background, he has guided 100+ companies through the systems and processes behind rapid revenue growth and built the AppExchange applications that power them. He founded Lane Four in 2013 and continues to lead its mission of turning revenue operations into a genuine competitive advantage.



lane four

SANJAY SINGH

PARTNER | CS EQUITIES

Dr. Sanjay Singh obtained his Ph.D. from UGA, serving as faculty at UAB for 20 years, in the Schools of Business, Engineering, Computer Science, and Healthcare Administration. Along with colleagues, Sanjay scaled and exited Applied Surgical (acquired by Stryker, NYSE: SYK), CTS (acquired by CGI, NYSE: GIB), and Pack Health (acquired by Quest Diagnostics, NYSE: DGX). He is currently a partner at CS Equities, focused on real estate. He serves on the boards of Oakworth Bank (OTCQX: OAKC) and Alabama Capital Network (chair). Sanjay also serves on the civic boards of Community Foundation of Greater Birmingham (president), Birmingham Bio Innovation Corp (chair), Birmingham Museum of Art (past chair), Rotary Club of Birmingham (past president), Prosper Birmingham, Alys Stephens Center, and Alabama Symphony Orchestra.



CS | EQUITIES



MARSHALL SLOANE

SENIOR ASSOCIATE | TA ASSOCIATES

Marshall M. Sloane is an investor at TA Associates, focused on investments in technology-enabled and business services companies in North America. Marshall is involved in TA's investments in LeadsOnline and Benecon. He joined TA in November 2023 from Lead Edge Capital, a \$5B AUM growth equity firm investing in software and tech-enabled businesses, where he worked in the New York office. Marshall graduated from Harvard College with a B.A. in History and Literature.



JOSHUA SMITH

CEO | OPĒ TECHNOLOGIES

Joshua Smith is CEO and Lead Inventor of OPĒ Technologies, a technology venture company developing breakthrough innovations in photonics, advanced computing, cybersecurity, and semiconductors. With more than 20 years in computing and 15 years in photonics, Joshua works at the intersection of science, engineering, and commercialization. He is an inventor on more than 48 patents worldwide spanning photonic computing, optical encryption, cybersecurity, and advanced systems. At OPĒ, Joshua leads deep-technology companies advancing optical computing, hardware-based encryption, secure communications, and semiconductor manufacturing, translating laboratory innovations into manufacturable, scalable products. His work spans technical development, IP strategy, company building, and commercialization alongside scientists, engineers, industry partners, and government stakeholders. Based in Mobile, Alabama, Joshua is a husband and father of three, balancing frontier technology with a family-centered life.



GARRISON SNELLING

FOUNDER | COMPUTESDK

Garrison Snelling is the founder of ComputeSDK, which runs independent benchmarks of the infrastructure AI products actually run on: sandboxes, storage, browsers, and AI gateways. Results ship every week as Benchmark Friday, where the providers being measured weigh in publicly. Every workload is open source, every run is published in full, and scores are weighted toward tail latency rather than best case. Garrison previously worked at LocalStack and Bolt.new. He lives with his wife and three children in Opelika, Alabama.



MATTHEW SPRAGUE

COO | SWOZ CONSULTING

Matthew has a proven track record of launching successful sales and marketing campaigns, building new businesses, securing customer loyalty, and forging long-lasting relationships with external partners and associates. He is proficient at driving multimillion-dollar revenue gains while providing visionary leadership in highly competitive environments, and over the years, Matthew has built various sales operations from the ground up. His business acumen, combined with leadership skills, allows him to recruit, train, and retain top-performing team members. Matthew earned his degree in consumer economics from the University of Georgia. He enjoys volunteering with organizations throughout his community and helping coach basketball and baseball. He and his wife, Mary, live just south of Atlanta in Newnan with their three boys - Benjamin, Lucas, and Nolan. Matthew is also a die-hard Chicago Cubs, Kansas Jayhawks, and Georgia Bulldog fan.



MIRANDA STAMPS

CHIEF OPERATING OFFICER | GOOD COMPANY

Miranda Stamps is the COO and EOS Integrator at Good Company, a technology-enabled third-party logistics company based in Springfield, Missouri. She has helped lead the company's growth from \$7 million to \$40 million in annual revenue while scaling its team from approximately 30 to 150 employees. Miranda oversees strategy and execution across operations, finance, people, technology, and client partnerships. She is passionate about transforming complex, fast-moving businesses into disciplined organizations that can scale without losing what makes them human. Known for asking direct questions and turning ambitious ideas into executable plans, she brings a people-centered approach to operational excellence. Before joining Good Company, Miranda lived and taught in China for nearly a decade, shaping her curiosity, adaptability, and perspective on leadership.



TIM STEVENS

COO | QUINSTREET

Tim Stevens is Chief Operating Officer at QuinStreet, Inc. (Nasdaq: QNST), where he leads company operations and oversees the Home Improvement business, the Financial Solutions business, advertising agency services, paid media channels, strategy and futures, and corporate development. Beyond QuinStreet, Tim is an entrepreneur and private investor, a founding capital member of SilverCircle Ventures, Taste Tomorrow Ventures, and Electric Ant Ventures, owner and Chief Winemaker of Misty Oaks Vineyards, and a minority owner supporting brand acceleration for Libretto Jazz Entertainment Group. He serves on the boards of GetTheReferral.com, Inc. and OneClick Data, Inc., and advises ventures including Womaness, Levitate.ai, Workera.ai, Keld, and MAC Energy. Tim earned a B.S. in Finance and Management from the University of Oregon, summa cum laude, and a J.D. from the University of California, Davis, Order of the Coif.





MATTHEW STEVENS

ENTREPRENEUR IN RESIDENCE | TECH SQUARE VENTURES

Matt is a serial founder and CEO turned investor following his most recent PE exit. As Entrepreneur in Residence at Tech Square Ventures he pulls from his years of experience as an operator to bring value-creating portfolio services to their portco's. Primarily working on go-to-market strategy and execution, Matt helps founders scale their businesses to achieve a growing enterprise value. Additionally he serves as an independent director in several high growth tech companies and is an active angel investor focused on the safety and security, robotics automation and supply chain sectors.



BRANDON STEWART

PARTNER | CARAVAN

Brandon Stewart is a partner at Caravan, the Birmingham-based AI training company, where he runs the company's finances and teaches both public and private trainings. He came in as a student in Caravan's first public cohort, started teaching soon after, and became a partner in early 2026. His focus is showing business leaders how to actually use AI in their day-to-day work, not just talk about it. Brandon is also CEO of Starboard Investments, a Birmingham holding company spanning restaurants, technology, health and wellness, and AI. He graduated from the University of Georgia in finance, worked in investment banking and private equity, and scaled a Jimmy John's franchise to 62 units across three states.



SARA STORCK

EXECUTIVE DIRECTOR | RED WAGON VENTURES

Sara Storck is Executive Director of Studio & Strategy at Red Wagon Ventures, Chick-fil-A's corporate venturing subsidiary, where she leads the development and growth of new businesses beyond the company's core restaurant operations. With a career spanning corporate venture building, innovation, brand strategy, and advertising, Sara has helped launch new ventures, build strategic capabilities, and create approaches for meaningful brand growth. Prior to Chick-fil-A, she served as an Innovation Director at Prophet, advising Fortune 100 companies on innovation, brand development, and growth strategy.

JAMES STREET

CEO | EPOCH SOLUTIONS GROUP

James is the CEO of Epoch Solutions Group, a leading provider of geospatial and mobile workforce management solutions for the utility industry. He has guided Epoch through significant growth, including a strategic investment partnership with SunTx Capital Partners to accelerate product innovation and market expansion. With a strong background in enterprise software and location intelligence, James focuses on transforming how electric, gas, and water utilities manage field operations and infrastructure. He is known for aligning advanced GIS technologies with real-world utility challenges to drive efficiency, safety, and reliability. James fosters a culture of integrity, collaboration, and continuous improvement, and is passionate about technologies shaping the future of field operations. His leadership continues to position Epoch as a key player in utility digital transformation.



JEANETTE SULLIVAN

CFO | RACKN

Jeanette is a CPA (North Carolina) with a 30-year track record of working with organizations in transition, both nationally and internationally. Jeanette began her career in the first wave of technology transformation, working on large system integrations for MCI, PacBell, and Export-Import Bank of the US at Andersen Consulting. After receiving her MBA from Duke University's Fuqua School of Business, Jeanette consulted with PwC's crisis management business, leading projects in SEC investigations, litigation, and bankruptcy. More recently, Jeanette worked at a subsidiary of Regions Financial Corporation as an SVP of Finance, leading the financial expansion of the investment manager from \$1 billion to \$2.2 billion AUM, expanding into seven countries, and increasing margin by 15 percent.



NELSON TEPFER

FOUNDER & CEO | PROCFO PARTNERS

Nelson Tepfer is Founder and CEO of ProCFO Partners, one of the largest fractional CFO firms in the country. His team serves as the outsourced financial leadership layer for privately held, growth-stage companies across the U.S. Nelson's focus is the point where growth outruns financial infrastructure: capital structure, forecasting discipline, and the operating cadence that makes a company sellable or holdable on the owner's terms. He has built ProCFO Partners to three consecutive Inc. 5000 placements. He holds an MBA from NYU Stern School of Business. Nelson lives in Brooklyn with his wife and three daughters, including 11-year-old twins. He collects mechanical watches, reads more science fiction than is strictly reasonable, and will talk shop on either.





trekAi

JOSH THOMASON

FOUNDER & CEO | TREK LEARNING

Dr. Josh Thomason, CPA, MBA is the founder & CEO of Trek Learning, the company behind TrekAi, an agentic learning platform designed to personalize education, reduce teacher workload and burnout, and restore human connection in the classroom. Since launching in 2025, TrekAi now operates across six continents and is on pace to grow 10x this fall. Prior to the launch of TrekAi, he spent over 15 years in K-12 education, including serving as CFO of one of the largest independent schools in the United States. Also, in 2016 he founded an online school that now serves nearly 2,000 students. Dr. Thomason holds a B.S. and MBA from Georgia Tech, and an EdD in Entrepreneurial Leadership in Education from Johns Hopkins University.



FT FITZ-THORS

ARNAR THORS

CO-FOUNDER & PRESIDENT | FITZ-THORS INDUSTRIES

Arnar Thors is Co-Founder of Fitz-Thors Industries, where he has spent nearly two decades helping entrepreneurs and companies turn ideas into engineered, manufacturable products. Founded in 2007, Fitz-Thors provides engineering, manufacturing, R&D, and government contracting capabilities across aerospace and defense, automotive, consumer products, pharmaceuticals, and medical devices, holding AS9100, ISO 13485, CMMC Level 2, and ITAR certifications. Arnar also co-founded Fitz-Thors Ventures, supporting startups including AerBetic, a wearable glucose-monitoring technology named Best in Show at CES 2019, and WaveLink Secure, a smart water-safety monitoring platform. He co-owns Hardware Park with Matt Fitzgerald, a two-block innovation and manufacturing hub in downtown Birmingham. Arnar holds a master's degree in mechanical engineering from the University of Alabama and serves on several of its engineering advisory boards.



PRESSW

TARUN THUMMALA

CO-FOUNDER & CEO | PRESSW

Tarun is the co-founder and CEO of PressW, an Austin-based technology company and official Anthropic partner. PressW specializes in deploying frontier AI solutions for institutional investment firms and their portfolio companies. Previously, Tarun served as CTO and Co-Founder of Gathr, an AI event management platform, where he led product and machine learning development through the company's acquisition in 2022. Tarun earned his B.S. in Computer Science from The University of Texas at Austin, where he specialized in AI & Machine Learning. He is a graduate of Phillips Exeter Academy and has been recognized as one of Austin's top tech founders by AustinInno and the Austin Under 40 Awards.

TOM ULRICSON

PRINCIPAL | ALPINE INVESTORS

Tom is Principal at Alpine Investors, where he focuses on sourcing, executing, and supporting investments in companies across the software and services industries. Alpine Investors is a people-driven private equity firm focused on building enduring businesses through an emphasis on exceptional leadership, purposeful growth, and long-term value creation. Originally from Milwaukee, Tom received his BBA in Finance from the University of Wisconsin-Madison. Tom currently lives in Brooklyn, New York, and outside of work, he enjoys CrossFit and has recently picked up mountaineering, having summited Grand Teton, Mt. Baker, and (almost) Mt. Rainier.



ALPINE

JASON VARNEY

CEO | SHARPER MMS

Jason Varney is a five-time founder and growth-focused executive with more than 20 years of experience building and scaling companies across the marine, technology, and SaaS sectors. As CEO of Sharper MMS, Jason is leading the rapid growth of a next-generation marina management platform built for an increasingly consolidated and institutional marine industry. His focus is scaling Sharper through enterprise growth, payments, product innovation, strategic acquisitions, and international expansion, with the vision of becoming the technology, data, and operational platform for the global marina industry. A lifelong entrepreneur with deep roots in the marine industry, Jason is equally passionate about life on the water. Outside of business, he enjoys boating, traveling, spending time with his family, and football - especially cheering on the Tennessee Volunteers where he resides in Knoxville, Tennessee.



\$ SHARPER
MARINA MANAGEMENT

JOSH WADDELL

CEO | VISALAW VENTURES

Josh Waddell is the co-founder and CEO of Visalaw AI, an end-to-end AI platform for immigration law, powering legal research and drafting. Before founding the Memphis-based company, Josh spent over a decade in legal operations, rising from Project Manager to COO at Siskind Susser, one of the country's top immigration law firms. An Alabama native and alumnus of Samford and Auburn universities, Josh is the proud father of two daughters and, unfortunately, a Memphis Grizzlies fan.



VAI



DAVID WAGNER

CEO | SURECOST

David Wagner is Chief Executive Officer and a board member of SureCost, a private equity-backed software company providing purchasing and inventory management solutions to the pharmacy industry. David has spent his career leading and advising growing technology businesses as an operator, management consultant, and investor. Prior to SureCost, David served as COO and CRO of Assembly Software and held various senior leadership roles at Omnitrac, a Vista Equity Partners portfolio company, and advised technology companies at KPMG and Kalypso. David earned both his undergraduate and graduate degrees in biomedical engineering from North Carolina State University. He is involved in various local organizations and currently serves on the board for the North Carolina State University's Engineering Foundation.



DANIEL WALSH

CHIEF EXECUTIVE OFFICER & FOUNDER | VEROSKILLS

Daniel Walsh is a three-time founder who has spent 14 years building companies at the intersection of technology and work. He co-founded TrueCoders, a globally ranked coding bootcamp, where as president he helped train thousands of people into software careers, many of whom had never written a line of code. That convinced him the bigger opportunity was in the trades. He founded VeroSkills in 2021 to bring the same shot at a career to blue-collar America, using AI agents to source, interview, and match skilled workers. The company is now rolling out nationally with one of the world's largest staffing firms, which is not bad for a startup out of Birmingham. At home, he's usually on the floor building Legos with his two boys.



JAMIE WARREN

OWNER & CEO | IRON TRIBE FITNESS

Jamie Warren is the owner and CEO of Iron Tribe Fitness, a 24-location fitness franchise system with eight company-owned gyms. In 2025, he acquired the brand from its founder after more than a decade as one of its largest multi-unit franchisees. His Iron Tribe story began as a customer. After a 20+ year career in marketing, advertising, and branding, Jamie sold his agency in 2014 and went all-in on building Iron Tribe's Nashville market. Today, he is leading Iron Tribe's next chapter as a tech-enabled service business, using AI, data, systems, and automation to strengthen a distinctly human product. His faith grounds his approach to leadership, stewardship, family, and service. Jamie loves the outdoors and lives in Birmingham with his wife, Julie, their three sons, and a golden retriever.

MARK WEIDICK

CEO | CRUNCHAFI

Mark Weidick is Chief Executive Officer of Crunchafi, a fintech and vertical SaaS company serving CPA firms, a role he has held since June 2024. He previously served as President of the mid-market focused Commercial Division at legaltech company, Onit, and as CEO of hiQ Labs, a predictive analytics and AI company whose landmark legal battle with LinkedIn helped define the boundaries of web data scraping law. Earlier in his career, he founded multiple venture-backed businesses and held leadership roles at Cisco Systems and Savi Technology. He's a Clemson Tiger (B.S.), Stanford Cardinal (M.S.), and Boston College Eagle (MBA). Mark resides with his family in Los Gatos, California and is an avid cook, a fan of business history, and enjoys learning to shoot a shotgun.



MICHAEL WEINSTEIN

SVP BUSINESS DEVELOPMENT | VISTA EQUITY PARTNERS

Michael Weinstein joined Vista Equity Partners in 2022 and is currently a member of the private equity Endeavor team. Prior to joining Vista, Michael was a Vice President of Business Development at Susquehanna Growth Equity, where he formed and grew the company's business development function, providing steady and high-quality deal flow. Before Susquehanna, Michael was Senior Director of Inside Sales at Bonterra (formerly Social Solutions), where he was responsible for scaling the company's inside sales team and developing its go-to-market sales strategy. Michael has spent over 13 years of his career working in senior and executive roles at Vista companies.



JENNA WELLS

CEO | SUPPLY WISDOM

Jenna Wells, originally from Boston, is a Distinguished Military graduate of Purdue University. She began her career as a U.S. Marine Corps Officer, serving as a Signals and Ground Electronic Intelligence Officer and deploying to Afghanistan in support of Operation Enduring Freedom. Following active duty, she held leadership roles at Wellington Management and Iron Mountain, overseeing global operations and third-party risk across 50+ countries. Jenna joined Supply Wisdom and served as COO, helping lead the company through its Series B funding before becoming CEO. Under her leadership, Supply Wisdom has expanded its global footprint, including opening an office in Ireland to support its growing EMEA operations. Jenna is a recognized leader in international risk management and serves on multiple boards.





MATTHEW WHITAKER

FOUNDER & CEO | EVERNEST

Matthew Whitaker launched Evernest by default. When the real estate market collapsed in 2008, the Birmingham-based investor was left holding 30 rental homes he couldn't sell. When no property manager met his high standards, he opened one himself. He spent Evernest's early years showing houses, signing leases, and talking with owners and residents. Today, as Founder and CEO, Matthew focuses on developing the Evernest team and leading the company's vision of managing 250,000 homes. Under his leadership, Evernest has grown into one of the nation's largest tech-enabled property management companies, managing tens of thousands of homes across nearly 50 markets and earning ten appearances on the Inc. 5000 list.



SIR STEVEN WILKINSON

FOUNDER & MANAGING PARTNER | GOOD & PROSPER

Steven Wilkinson is Founder and Managing Director of Good & Prosper, a private investment and advisory company founded in 1998, based in Germany and active in both the USA and Europe. Good & Prosper accompanies a select handful of business owners at critical inflection points as a thinking partner and strategic advisor. Steven's background includes 35 years of involvement in the international capital markets and investment management, the last 25 years of which primarily running his own balance sheet. Steven is a consummate connector of people and ideas. He is a committed free market libertarian with a strong faith grounding. He publishes regular essays under the title of Pitchfork Papers on Substack and is a frequent guest on podcasts.



JUSTIN WIRPEL

CEO | FLOORING OS

Justin is the chief executive officer of Flooring OS. He has experience as a manager, equity partner, and board member for over a dozen firms. With his background in marketing, software development, strategy, accounting and finance, he founded Flooring OS with his partners to offer an entirely new digital cloud experience to the flooring industry. Justin holds a degree in finance from Dallas Baptist University, an MBA from Washington University in St. Louis, and a master's degree in marketing from the University of Alabama (Roll Tide!). He also holds multiple industry and Microsoft certifications. Justin lives in Houston, Texas with his wife, Dawn, a cardiac surgeon; they have a 33-month-old daughter named Sloane who is a part-time real estate investor.

HUNTER WITHERINGTON

MANAGING PARTNER | SSM PARTNERS

Hunter Witherington is a managing partner at SSM Partners, a private equity firm that makes minority and majority investments in B2B software and tech-enabled services companies. Hunter currently serves as a board member for SSM portfolio companies Alt Legal, KEEPS, Kukui, and Quire. Prior to joining SSM in 2004, he spent several years in investment banking with Stephens Inc., working on M&A, private placements and public offerings for middle-market companies across numerous industries. Hunter received his bachelor's degree in economics from Vanderbilt University and has been an avid Vanderbilt sports fan his entire life, long before the university's more recent athletic success. Hunter lives in Memphis, Tennessee, with his wife and three children, and enjoys playing tennis in his spare time.



BRYCE YOUNGREN

MANAGING PARTNER | POLARIS GROWTH FUND

Bryce is a managing partner of the Polaris Growth Fund based in Boston. He joined the firm in 2002 and focuses on investments in profitable software and technology-enabled services businesses. Bryce currently serves on the boards of Amplifire, ARInsights, ATC, Baxter Planning, and SETWorks, and has also served on the boards of Blue Rabbit, Cardlytics, Cityworks, Cushcraft, Dealer Spike, Digicert, Liaison International, National Electronic Attachment, Research Now, Strata Health, TRG and Xpressdocs. Prior to joining PGF, Bryce worked at Great Hill Partners, where he sourced and executed investments in SmartMail Services (Deutsche Post) and ManagedStorage International (Incentra Solutions). Bryce holds an MBA from The Wharton School at the University of Pennsylvania and a B.A. in economics from the University of Illinois at Urbana-Champaign.



TONY ZAKULA

CEO | KODARIS

Tony Zakula is a lifelong software engineer and entrepreneur who founded Kodaris in 2014, an open SaaS Supply Chain Platform purpose-built for B2B to do business the way companies need to do business. Under his leadership, Kodaris has grown by building the platform in close partnership with customers, shaping the product around the real-world workflows of customers. Tony's combined engineering and business background gives him a hands-on approach to product strategy, and he remains deeply involved in solving the technical and operational challenges customers face every day. He is always looking for the next big problem to solve together with his customers and partners.





DESTIFY

ALEX ZATVOR

FOUNDER & CEO | DESTIFY

Alex Zatvor is the founder and CEO of Destify, one of North America's leading destination wedding platforms. Founded in 2012 and headquartered in Chicago, Illinois, Destify combines purpose-built planning and booking technology with a 100+ person global team, and has helped more than 10,000 couples and their guests celebrate at the world's top all-inclusive resorts. Outside Destify, Alex is an active private investor and enjoys trail running. He lives in Chicago with his wife, Kristy, and their four young kids.



STEVE ZIEJA

PRINCIPAL | EDISON PARTNERS

Steve Zieja is a principal and investment committee member at Edison Partners, based in Nashville, Tennessee. He invests in growth-stage enterprise software and healthcare IT, with a focus on companies digitizing critical infrastructure and technology-enabled models advancing value-based care. His board involvement includes CleanDesign, ClearJet, MappedIn, Slingshot Aerospace, Take Command Health, Payra, Field Effect, and Pixability. Prior to Edison, Steve invested at Morgan Stanley, Spring Lake Equity Partners, and Tudor Growth Equity, with an operating stint at sports technology startup Silbo. A two-year basketball captain and First Team All-American at Amherst College, Steve played in four NCAA tournaments and left as the school's all-time leading scorer. He holds an M.S. in Sport Management from UMass and lives in Nashville with his wife Liz, two daughters, and an energetic Vizsla.

#

120Water Casey Myers
86Borders Daniel McDonald

A

Accelerated Claims Jane Sidler
Accel-KKR Christopher McMullan
Aesto Health Scott Ferguson, Michael Girouard
Alabama Capital Network Benzamin Choi, Hunter Custard
Alabama Power Tiffany Davis, Kevin Kaye
Alden Systems John Sciarabba
Alpine Investors Tom Ulricson
Altus Nova Technologies Keith Dudley, Jason Parrish
AngelEye Health Christopher Rand
AngelTrax Richie Howard
Applied Catalysts & Technologies Lee Mitchell
Aprio Eric Krucke, David Siegel
Aquiline Bruce Crabtree
Arcoro Dave Gray
Asureti Melissa Ryan

B

BattlBox John Roman
Bespoke Capital Cody Hilbun, Daan Mutsaers
BlueFletch Richard Makerson
Bregal Sagemount Zuhair Khan
BuildingReports Bryan Shaver
Bull City Venture Partners Jason Caplain
BusinessLoans.com Mack Johnston

C

CAC Specialty David Barnes, Allison Netto
CADY Josh Cady
Caravan Brandon Stewart
CFO Systems Brett Frevert, Shelly Ruwe
ChangeGuard Will Denton
Chick-fil-A Michael Erwood
ChiroHD Gabriel Doty, Luke Doty
Circool Jason Routson
City Detect Gavin Baum-Blake
Clarus Richard Maradik
Clearlake Capital Group Dan Groen
CO8.ai Marc Hardgrove

C (cont.)

ComputeSDK Garrison Snelling
Crunchafi Mark Weidick
CS Equities Sanjay Singh

D

DataVizion Kelly Schrad
DataWeave Karthik Bettadapura
DataXstream Michael Burns
DeliverThat Aaron Hoffman
Demopolis Equity Partners Tim Greenfield
DentalOwl Patrick Kent
Dentistry on Purpose Patrick Jarvis
Destify Alex Zatvor
DevClarity Will Blackburn, Peter Inge
Diversified Energy Company Brad Gray
DragonFly Athletics Kirk Miller
DragonflyOP Jim Barnish

E

Edison Partners Steve Zieja
Epoch Solutions Group James Street
Equip Trent Kocurek
Evernest Matthew Whitaker

F

Fast Slow Motion Matt Dyar
Fifth Letter Jordan Jones
Files.com Kevin Bombino
FIntegrate Technology Kristopher Bishop
Fitz-Thors Industries Arnar Thors
Flooring OS Justin Wirpel
Front Porch Venture Partners Gregg Bordes

G

Good & Prosper Sir Steven Wilkinson
Good Company Miranda Stamps
Greater Sum Ventures Ross Croley
GreenCourt Jay Bland, Andy Johnson
GreyLion Jody Shechtman
GRO Marketing Matt Pavlick
Guidepost Growth Equity Taylor Doherty

G (cont.)

Gumption Jonathan Dickerson
Gunderson Dettmer Zach Crowe, Jason Cummings

H

Harmony Venture Labs Shegun Otulana
How To Saas Farhad Chikhlwala, Shiv Narayanan

I

Inbox Monster Thomas Barnhart, Matthew McFee
Incubators.com Alexander Daskaloff
Insight Partners Danielle Feitler
Intellikid Systems Jared Hall, Avery Ma
Iron Tribe Fitness Jamie Warren

J

Join It Mitch Colleran
Jurassic Capital Kevin Mosley

K

Kisi Max Schuetz
Koch Disruptive Technologies Nate Purdum
Kodaris Tony Zakula
KPI Sense Dan Palay

L

Lane Four Andrew Sinclair
Lead Edge Capital Peter Maluff
LeadsOnline Alex Finley, Travis White
Legisym David Kessler
Liberty Rent Bubba Grimsley, Tatum Rezin
LiminalArc Mike Cottmeyer

M

M33 Growth Tommy Belton
Mailprotector Mike Eis, David Setzer
Mainsail Partners Collin Riccitelli, Brian Russell
Maptician Alaa Pasha
McLeod Software Mario Moore
MicroAutomation Suresh Gursahaney
Mile Auto Fred Blumer

M (cont.)

Morgan Stanley Farra Alford, Hollis Gieger Jr.
mPower Beverage Patrick Mooney

N

Neurotek Connect Michael Corkery
Nexa Equity Joey Maloney

O

OneClick Data Garrett Kurtz
OPe Technologies Joshua Smith

P

Paragon Health Ventures Ian Juliano
Patchwork Labs Tyler Harper
Payroll Integrations Doug Sabella
PeopleCap Advisors Meg Crosby
Polaris Growth Fund Bryce Youngren
PressW Tarun Thummala
ProcessMiner Tom Morris
ProCFO Partners Nelson Tepfer
PSG Equity Christopher Collins
PuzzleHR Natalie Corona

Q

Quantalytix Will Bryant
QuinStreet Tim Stevens
Quore Scott Schaedle

R

RackN Jeanette Sullivan
Radian Capital Aly Lovett
Recurring Capital Partners Brian Henley
Red Elephant Indu Sanka
Red Wagon Ventures Worth Lumry, Sara Storck
Relevance John Hall
Resurgens Technology Partners Daniel Carpenter
RF Investment Partners Jacob Gordon
Runway Growth Capital Jeff Goldrich

S

SaaS Capital	Robert Belcher
SaaSCEO.com	Victor Cheng
ServiceTrade	Billy Marshall
Sharper MMS	Jason Varney
Smart Church Solutions	Tim Cool
Spectrum Advanced	Matthew Lippmann
Square Clover	Devon Fata
SSM Partners	Hunter Witherington
Stancil CPA	Brent Droege
StartGuides	Alex Panosian
Street Digital	Donald Kleckner
StreetMetrics	Drew Jackson
Strudel	Kristin Isaac
Supply Wisdom	Jenna Wells
SureCost	David Wagner
Switch Consulting Group	Christine Connor
Swoz Consulting	Matthew Sprague
Synergist Technology	Robert Flippo

T

TA Associates	Marshall Sloane
TaxConnex	Robert Dumas
Tech Square Ventures	Matthew Stevens
Techstars	Matthew Jaeh
Tellerix	Robert Long
The Lioce Group	Anthony Lioce
The Motley Fool	Nick Sciple
The New Flat Rate	Danielle Putnam
The Parasol Group	Erik Enright
The Vested Group	Joel Patterson
thinkbridge	Anand Krishnan
Ticketnology	Morgan Katz
Tidemark	Christian Kurth
Trajectory Network	Dave Parker
Transform9	Alan Creighton
Trek Learning	Josh Thomason

V

Valor VC	Lisa Calhoun
VeroSkills	Daniel Walsh
Vertical IQ	Bobby Martin
Vessel Advisors	Brennan de Raad
Visalaw Ventures	Josh Waddell

V (cont.)

Vista Equity Partners	Michael Weinstein
Vistage	Ankur Agarwal

W

Warren Averett	Hanny Akl, Larry Pirkle
Wavecrest Growth Partners	Evan Cummins
Western Alliance Bank	Dan Pistone, Josh Roberts





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