



AEG

Association for
Enterprise Growth

ELITE ADVISORS

ANNUAL REPORT



2022

WORDS FROM YOU

Steve Taormino, President & CEO, CC&A Strategic Media Elite Advisor, Baltimore

"AEG has been a great referral source for me. I've met new people. They've introduced me to other organizations that I can work with, but more so than that, it's just a great sounding board for new ideas and concepts and helps you to think outside of the box. Many of the organizations I'm associated with work in different industries and think through things in a different way."



WORDS FROM US

A note from the CEO, Mark Haas

What an exciting year! As I look back on 2022 it really has been one of exploration, insight and growth for our Elite Advisors. We heard from members and guests alike how much they enjoyed the time spent together, whether at meetings, in Power Groups or during our social events.

As AEG expanded into additional cities we saw membership steadily grow. Our Elite Advisors developed business relationships and trust communities in each chapter and across several cities. This has meant a deeper understanding of each other as people and successful professionals and has led to more business referrals for our community.

In 2023, we look forward to welcoming new members and opening chapters in new cities. Stay tuned!



WHY AEG?

AEG is a growing network of exclusive business communities built upon a single, essential tenet: **trust**. We curate groups and experiences that accelerate the trust timeline to expedite business and personal success.

Each Elite Advisor candidate is carefully vetted. Our community includes those recognized as top professional service practitioners in over 50 complementary disciplines supporting mid-market businesses. AEG events are invitation-only and candidates for membership need to be a good fit for both AEG and the Elite Advisors.



CORE VALUES

**GIVE
FIRST**

**DO
GREAT
WORK**

**LIVE
PASSION-
ATELY**

**HAVE
FUN**

Our Elite Advisors embody the four AEG core values:

Give First – *put others ahead of ourselves*

Do Great Work – *serve others with integrity and competence*

Live Passionately – *live life to the fullest in your family, business, and community*

Have Fun – *bring joy to yourself and those with whom you engage*

We work together to forge deeper connections fulfilling our mission to create personal and business growth through trusted relationships.

Other groups may start with transactions. AEG starts with **trust**.

MEMBER

BENEFITS

- **Monthly member meetings** *intentional networking with great food, wine and Happy Hours!*
- **Power Groups** *breakout sessions designed for building strong relationships*
- **Referrals** *for new business with great prospects*
- **Cross-chapter** *event access*
- **AEG Hosted Business Leader Events** *where members can escort their clients and spend time with 20 CXOs in one room, including:*
 - *Lunches - for CXOs of \$2-20M annual revenue firms*
 - *Salon Dinners - for CEOs of \$20M+ annual revenue firms*
- **Quarterly Virtual Professional Development** *webinars*
- **Weekly newsletters** *to thousands of area CEOs (>40% open rate) to which AEG members can add content alongside Harvard Business Review, CEO Magazine and other top tier business publications*
- **Complimentary access** *to events that AEG sponsors*
- **Members-only social events** *including cookouts, golf outings, bowling, wine tasting and much more.*
- **Social media** *member spotlights*

WORDS FROM YOU

Debbie Bates-Schrott, Senior VP, Yes& Agency Elite Advisor, Washington DC

"I think the really unique aspect of AEG is the authenticity that people bring to the meetings. People really get to know each other and when you trust someone and really get to know them, you want to do business with them. You want to give them referrals, you want to see them more often and I don't necessarily find that in other business communities. "



AEG LEADERSHIP TEAM

HQ



Mark Haas

Co-founder & CEO

mhaas@enterprisegrowth.org



Tien Wong

Chair

twong@opus8.com



Rosemarie Savino

COO

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Paula Boyland

AEG Administrator

paula@enterprisegrowth.org



Morgan Rath

Member Operations Manager

mrath@enterprisegrowth.org

BALTIMORE

MARYLAND

Charm City is host to our Baltimore Elite Advisor Chapter where we meet in and around Baltimore City and Howard County. Our goal is to continue to grow our chapter with highly successful professional service providers to mid-market firms in the greater Baltimore area. Established in late 2021, our Baltimore community highlights the diversity of industry and commerce that our members leverage to strengthen their businesses and the overall economy.



Brian Meritt

Co-Director
Baltimore

brian.meritt@globalpartners.com



Tasha Cornish

Co-Director
Baltimore

tcornish@enterprisegrowth.org

OUR MEMBERS

BALTIMORE



MATT BJONERUD
Founder & CEO
Cerebro Capital
Debt Financing Services



JACK CAVANAUGH
Partner
Brown Advisory
*Investment and growth
advisor*



BRENDAN LOUGH
SENIOR VP
JLL
Commercial Real Estate



TODD MARKS
Founder, CEO, & President
Mindgrub Technologies
*Digital Agency and IT Services
and Consulting*



LEN MILLER
President
Leonard J. Miller & Associates
*Accounting, tax and
consulting services*



JUSTIN MOLIGNONI
President
Real Science Holding
Company
HealthTech Entrepreneur



KEITH MOULSDALE
Partner
Whiteford Taylor & Preston
Cybersecurity and IP Law



ANNE SIGMAN
Coach
Group Facilitator



STEVE TAORMINO
CEO / Expert Witness / Speaker
CC&A Strategic Media
*Communications and
Marketing Services*

ADVISORY BOARD

BALTIMORE

AEG's Advisory Board consists of seasoned corporate executives, experienced in starting, building and exiting companies. They advise individual AEG members on approaches to help clients grow company value, exit and build personal wealth, are available to AEG client business leaders and advise on the growth and operations of AEG as an organization.



MARCO ÁVILA, P.E.
Director
WSP



GEORGE DAVIS
Executive VP, Strategic Advisory
Evergreen Advisors



MIKE DIGIACOMO
Executive Director
Governor's Workforce
Investment Board



MIKE GILL
Chairman
Evergreen Advisors



LAURA NEUMAN
Entrepreneur & CEO



ED MULLIN
Executive Director
Baltimore Robotics Center



MARTIN ROSENDALE
Host, Capital M Podcast
CEO Advisor and Investor



THOMAS SADOWSKI, JR
Executive Director
MEDCO

WASHINGTON

DC

Washington DC is the inaugural community for AEG, established in 2018. Through the ensuing years we have supported our members as they have grown, evolved and exited. Even during lockdown we held remote sessions to ensure members could engage and move their businesses forward. Emerging to full in-person meetings again in 2022, folding in additional events and webinars as requested by members, we continue to see this community thrive.

DIRECTOR



Mali Phonpadith

Director

Washington

mphonpadith@enterprisegrowth.org

OUR MEMBERS

WASHINGTON DC



GARY ALTMAN

Principal
Altman & Associates
*Personal attorney and estate
planning*



JOE APPELBAUM

President
Potomac Companies Inc.
*Comprehensive benefits and
insurance*



DARRIN AUTO

Partner
HEA Law, PLLC
Patent, IP and Trademark Law



DEBBIE BATES-SCHROTT

Senior VP
Yes& Agency
*Branding and Marketing
Strategies*



RICH DIIPPO

Partner
NFP
*Financial services for owners,
executives, and families*



JOE DELANEY

Agency President
Assured Partners
*Risk management and
insurance issues*



JERRY DISTEFANO

Director
CohnReznick
*Accounting, tax and
assurance services*



TOM DURRER

SENIOR VP
Atlantic Union Bank
*Commercial banking,
business growth planning*



JED FOCHTMAN

Founder
Capital Advisors LLC
*Management of corporate
operation and financials*

OUR MEMBERS

WASHINGTON DC



AARON GH AIS
Shareholder
Shulman Rogers
Legal-M&A Attorney



JOE GOLDEN
Managing Director
BGX Advisory
*M&A advisory and valuation
services*



ROB HUEY
President
Huey & Associates
*Accounting, tax, audits and
financial reviews*



LATONYA JACKSON
Founder & Chief Consultant
L. Jackson Associates LLC
Strategic Operations Executive



KATIE JORDAN
Principal
Verasolve
*Business-to-business sales
and operations*



MANISH MUKHI
Financial Advisor
Ameriprise
Financial services



JOHN NOLAN
CFO
iControl Data
*Strategic Financial and
Operations services*



DON OLINGER
Partner
Cordia Partners
*Staffing, advisory and
accounting services*



KEITH B. PERRY
President
Xebec Enterprises
IT Services and IT Consulting

OUR MEMBERS

WASHINGTON DC



PETE RYAN

Partner
Ryan & Wetmore
PC and Wealth Advisor
Alikos Wealth Management
Accounting and tax litigation



OLA SAGE

CEO
CyberRx
*Cybersecurity risk and
compliance assessment*



SHEVY SHAFIE

CEO & Chief Marketing Officer
Marstudio
*Strategic branding and
fractional CMO*



TODD SHERBACOW

Senior VP
MGA, Inc.
Commercial Real Estate



DUSTIN SIGGINS

Founder
Proven Media Solutions
*PR, Media and Marketing
Communications Specialist*



TOM SPRINGER

Managing Partner
Springer Lawson & Associates
*Advisor and management
consultant*



BARRY WEINBAUM

Financial Services Professional
NYLIFE Securities, LLC
*Financial Services and
Insurance Professional*



MICHAEL WOLK

Principal
Expense Reduction Analysts
*Expense reduction and cost
strategy*

ADVISORY BOARD

WASHINGTON DC

AEG's Advisory Board consists of seasoned corporate executives, experienced in starting, building and exiting companies. They advise individual AEG members on approaches to help clients grow company value, exit and build personal wealth, are available to AEG client business leaders and advise on the growth and operations of AEG as an organization.



LYLES CARR

Senior VP
The McCormick Group



DEBORAH FELL

Area Managing Partner & CMO
Chief Outsiders



JEFF GALVIN

CEO
American Gene Technologies



FRED GUMBINNER

President
DC Keiretsu Forum



ANITA GUPTA

Founder & CRO
KiwiTech



BETH JOHNSON

Founder & CEO
RP3 Agency



JIEMIN JORDAN

Managing Partner
Decisive Investment Group



JOE KESSLER

Managing Partner
Next-Stage Development
Group, LLC



BEN LITALIEN

Founder & Principal
FranchiseWell

ADVISORY BOARD

WASHINGTON DC



MIKE NIGGEL
CEO
ACTI Federal



AMIT PURI
CEO
Kurtek

TAMPA BAY

FLORIDA

With our first major expansion beyond the greater DMV area, AEG opened a new chapter in thriving Tampa Bay late in 2022. We were pleased to welcome our new City Director and our first Founding Member, who are both working to develop a diverse and collaborative community in the heart of growing Tampa Bay.

DIRECTOR



ANN PEREIRA

Elite Advisor Director, Tampa Bay
Inner Circle Director, Tampa Bay
AEG

OUR MEMBERS



JOHN WHITE

Vice President
Marsh McLennan Agency
*Insurance and employee
benefit services*

WORDS FROM YOU

Fred Gumbinner, President, DC Keiretsu Forum, Advisory Board Member, Washington DC

One of the best things about AEG is the people. There is a wide range of diverse expertise of people very involved in helping themselves, customers and other AEG members. It's a good coalition of people that have a complementary skill set that provide comprehensive support for each other and the businesses they try and help.



BY THE NUMBERS

450

HOURS

of member to
member interactions
in 150 hours of
Power Groups

51

EVENTS

Hosted by AEG in
2022

25

**MEMBER
MEETINGS**

across three city
chapters

4

**SALON
DINNERS**

for CEOs

463

REFERRALS

given and received by
members in 2022

4

WEBINARS

Virtual Professional
Development

5

**SOCIAL
EVENTS**

4

**BUSINESS
LUNCHES
& DINNERS**

for CXOs

7

**COMMUNITY
SPONSORSHIPS**

MEMBER MEETINGS



Zack Garber from Alex. Brown spoke about how to leverage your network to ignite your business, and provided tips for mentoring millennials and Gen Z.



Our host was **Tasha Cornish**, AEG Advisory Board Member, Executive Director of Cyber Association of Maryland, Inc. Our program focused on the large and growing Cyber industry and included a panel of Cyber industry business owners.



We enjoyed a great discussion in at the Engineer's Club. We welcomed **Tasha Cornish** as our new Co-Director. **Laurie Mosebrook** led a lively panel discussion on digital transformation and the impact on the value creation and growth of businesses.



January kicked off a new era for AEG DC. **Mali Phonpadith** joined over as DC Chapter Director, assuring continuity and engagement for members as we continue to grow.



Michael Wolk was our featured member-speaker, sharing insights on the "Art and Science of Price Negotiation". Elite advisors enjoyed getting to know each other's business needs during the breakout sessions.



There was a packed house at Industrious Tysons. Mali kicked off the meeting with a big hello to more than 40 elite advisors and guests, followed by an insightful professional development segment hosted by **Debbie Bates-Schrott**.

QUARTERLY EVENTS



*The Art + Science
of Price Negotiation*
Mike Wolk, Principal
Expense Reduction Analysts
VIRTUAL - ALL CHAPTERS



American Prime
WASHINGTON DC



*Outlook For the Greater Washington DC
Business Economic Environment*
Jack McDougle, CEO
Greater Washington Board of Trade
Tower Club
WASHINGTON DC



*A Catered Wine Pairing with
Caribbean inspired dishes*
Kindra Dionne, Owner
Fifty Leven
Industrious, Pike & Rose
WASHINGTON DC

MEMBER MEETINGS



Liz Wainger gave us a front-row seat to how Wainger Group partners with clients to clarify, simplify, and amplify their message. **Jack Cavanaugh** and the team at Brown Advisory; hosted us in their beautiful space and graciously provided our food and drink for the evening.



Tien Wong, CEO, Opus8, delivered a master class on creating a powerful network and using it to grow your business. In his words, "Success is a Contact Sport"!



We kicked off the business part of our meeting by presenting our Elite Advisors with AEG gift bags, embodying our 4 Core Values, and giving each advisor space to reintroduce themselves. Through **Brian Meritt's** example, on-the-spot referrals were provided.



Lyles Carr, SVP of The McCormick Group, led a fantastic presentation. The focus was on helping our elite advisor community see and seize opportunities to help our clients see and value our expertise in their time of greatest need.



Joe Delaney, Agency President of Assured Partners, led our professional development segment this month. The focus was on Employee Benefits and the valuable resources available for planning that can support our (and our clients') unique needs.



Ken Harvey truly inspired us during his speech about "The Reinvention of a Leader in our Ever-Evolving World." We put the spotlight on our Elite Advisors and showed AEG's appreciation with swag-bags reflecting our four Core Values.

QUARTERLY EVENTS



*How and Why Businesses Are
Creating "C3 Cultures" Using
Behavioral Science*
Mali Phonpadith, CEO
SOAR Community Network
VIRTUAL - ALL CHAPTERS



The Palm
WASHINGTON DC



*OKR for Business Leaders,
co-hosted by Bill Van Dyke*
Tim Meinhardt, President &
CEO Atruity
Tower Club
WASHINGTON DC

MEMBER MEETINGS



Kimberly Prescott led a conversation on the foundations of growing your business in a diverse world. She identified the critical first step as building a strong, inclusive company culture to grow authentic relationships with our employees, customers, and partners.



Katie Nelson led us on a journey to a revenue growth mindset. No matter where you sit in the org chart - and especially as the CEO - you need to lean in to your role in "sales." We confronted our thoughts and emotions around sales, and Katie busted our myths about revenue growth.



Debbie Bates-Schrott led us on a journey of effective (and ineffective!) brand strategy. Brand stretches beyond your logo and your core values; Debbie's presentation highlighted that the lack of a clear brand creates opportunities for others to define it for you.



Our featured guest was **Marissa Levin** who spoke on the topic of how top companies create breakthrough growth through exceptional advisory boards. Everyone in attendance received an autographed copy of Marissa's #1 best-selling book, Built to SCALE.



The August meeting focused on creating a higher level of networking for our Elite Advisors and guests. We held networking breakout sessions, to get to know one another and build deeper connections.



Our program this month was a fireside chat moderated by **Mali Phonpadith**, featuring **Jack White** and **Lyles Carr**. The insights they shared showcased the importance of cultivating relationships and creating lasting impact.

QUARTERLY EVENTS



Bowling & Happy Hour!
Bowlero
ALL CHAPTERS



Follow up strategies that will get more clients and close more sales
Wanda Allen, Follow Up Expert
Virtual
ALL CHAPTERS



Sponsorship
Mid-Autumn Festival
Chinese Culture Institute



Helping local business owners identify high ROI strategies for growth
The Tower Club
WASHINGTON DC



The Tower Club
WASHINGTON DC



Cookout & Golf
Blue Mash Golf Course
ALL CHAPTERS

MEMBER MEETINGS



Todd Marks, CEO of Mindgrub, demoed the Mindgrub office in the metaverse. Todd highlighted how effective web and mobile application development can transform operations and customer success.



Our speaker **Ken Ulman**, highlighted economic development strategies that Maryland has employed to create thriving communities around academic and other assets.



Our Inaugural Elite Advisors meeting was a success! **Ann Pereira**, AEG Tampa Bay Director, welcomed our prospective Elite Advisors with great food and beverages by Hyatt Place downtown Tampa. Each person had the opportunity to share a need and get support from the room.



Our program was a fireside chat moderated by **Mali Phonpadith**, featuring **Tien Wong**. The topics evoked curiosity and a meaningful discussion among members and guests focused on the changing landscape of our business community in the DMV area.



Our featured speaker this month was **Dr. Melvin Murphy**, Business Research Scientist. This month we rolled out "Needs and Leads" where each Elite Advisor and our guests had the opportunity to share a need and get support from the group.



Great food, drinks and everyone connecting is the name of the game and our December meeting did not disappoint! Our "Needs and Leads" section of our meeting was interactive with great ideas and assistance offered.

QUARTERLY EVENTS



Sponsorship
18th Annual Gala
Lao Heritage Foundation



Cybersecurity Trends for Growing Businesses
Bhavesh Vadhani, Principal and Global Leader
Cybersecurity, CohnReznick
Tower Club
WASHINGTON DC



Cybersecurity for Small and Medium Sized Businesses
Ola Sage, CEO, CyberRX
Virtual
ALL CHAPTERS



What CEOs need to Know: Managing Cyber Risk in a Growing Business
Sam Bell, CISO, Edwards Performance Solutions
Cured
BALTIMORE



Capital Grille
WASHINGTON DC



Mid-Atlantic Region
Holiday Party
Norbeck Country Club
BALTIMORE & WASHINGTON DC

WORDS FROM YOU

George Davis, Executive VP, Evergreen Advisors Elite Advisor, Baltimore

“How has AEG helped my business? In many ways. I’ve been connected to opportunities that have resulted in revenue for my business and I’ve been able to network into areas I previously didn’t have access to.”



LOOKING FORWARD

Regularly scheduled Chapter meetings are held as follows:

Washington (**DC**) - 2nd Tuesday of each month

Baltimore (**BLT**) - 3rd Tuesday of each month

Tampa Bay (**TB**) - 3rd Thursday of each month

2023 DATES TO REMEMBER

January 24

Professional Development

ALL - VIRTUAL

February 23

Salon Dinner

DC

February 28

Business Luncheon

BLT

March 9

Business Luncheon

DC

March 15

Salon Dinner

TB

March 28

Professional Development

ALL - VIRTUAL

May 24

Business Luncheon

DC

May 30

Professional Development

ALL - VIRTUAL

June 7

Salon Dinner

DC

June 21

Business Luncheon

BLT

July 25

Professional Development

ALL - VIRTUAL

August 2

Salon Dinner

DC

September 7

Business Luncheon

DC

September 26

Professional Development

ALL - VIRTUAL

October 12

Business Luncheon

BLT

November 8

Salon Dinner

DC

November 28

Business Luncheon

BLT

November 28

Professional Development

ALL - VIRTUAL

December 6

Business Luncheon

DC

December 19

Holiday Gathering

DC & BLT

**All dates subject to change*