

BUSINESS PROS ROSTER - 3/3/2024

FOUNDER				
BUSINESS PRO Category	BUSINESS PRO	Company	Phone Number	E-Mail Address
Certified Financial Planner/ Investment Advisor/ Life Insurance	Jeff Sandene, CFP®	Sandene Strategies, LLC	(214) 564-5333	jeff.sandene@jpl.com

ADVISORY BOARD MEMBERS				
BUSINESS PRO Category	BUSINESS PRO	Company	Phone Number	E-Mail Address
IT Consultant/ Fractional Chief Information Officer	Kent Barner	CIO Suite	(214) 952-3190	KentBarner@CIOSuite.com
Small Business Health Insurance	Michael Battaglia	InsureYouToo, LLC	(972) 832-4840	Michael@InsureYouToo.com
Fractional CFO	Craig Beck	Beyond CFO	(630) 240-1383	CraigBeck@beyond-cfo.com
Accounts Receivable Factoring / Asset-Based Lendor	Russell Duckworth	American Bank, N.A.	(214) 801-0627	rduckworth@abdallas.bank
Sales Leadership Consultant/ Fractional Chief Revenue Officer	Debbie Mrazek	The Sales Company	(214) 676-8486	SalesDeb@AOL.com
Leadership & Executive Training	Kenda-Le Pernin	Mark Kamin & Associates	(214) 282-7905	k.pernin@mka-world.com
Tax Credits and Incentives	Lindsay Polyak	Tax Credit Collective	(817) 980-1134	lindsay@taxcreditcollective.com

LEGACY MEMBERS				
BUSINESS PRO Category	BUSINESS PRO	Company	Phone Number	E-Mail Address
CPA Firm: Regional, Full Service	Emily Ackerman	Bennett Thrasher	(469) 766-4654	Emily.Ackerman@BTCPA.net
Property & Casualty Insurance Broker	John Allen	Community Insurance Advisors	(972) 849-3145	jallen@comminsadvisors.com
Marketing Agency	John Arnott	Content First Marketing	(972) 533-9779	JArnott@ContentFirst.Marketing
HRIS / Payroll Service Provider	Todd Cassell	Heartland Payment Systems	(909) 693-0711	todd.cassell@e-hps.com
Profitability Analysis Software	Cary Clayborn	Profit, Inc	(214) 202-8939	cary@profitinc.com
Executive Search & Recruiting	Alexis Dowell	Risch Results	(936) 222-3414	alexisdowell@rischresults.com
Mediation & Conflict Strategy Coaching	Dana Garnett	Mindful Strategy	(505) 401-9309	dana@mindfulstrategy.com
Podcast Production & Consulting	Erin Gregor	PodGrowth	(602) 738-0078	erin@eringregor.com
Human Resource Consulting/ Fractional Chief HR Officer	Glenna Hecht	Humanistic Consulting	(469) 766-6110	glenna@glennahecht.com
Community Commercial Bank	Chris Honeycutt	Texas Security Bank	(214) 282-2980	Chris.Honeycutt@texassecuritybank.com
SBA Lender	Brian Hunt	Live Oak Bank	(214) 802-7411	brian.hunt@liveoak.bank
Business Broker / Seller Business Valuation	Larry Lane	VR Business Brokers	(214) 733-8282	llane@vrdallas.com
Enterprise Data Integration Software	Monty Miller	Orchatect	(469) 219-7720	monty.miller@orchatect.com
Regional Commercial Bank	Dan Nye	First United Bank	(214) 784-2797	dan.nye@firstunitedbank.com
Inventory & Supply Chain Optimization	Troy Patterson	Visigistics, LLC	(214) 621-1197	Troy.Patterson@Visigistics.com
Estate Planning Attorney	Jake Pollack	Shackelford, Bowen, McKinley & Norton	(214) 780-1332	jpollack@shackelford.law
Entrepreneurial Operating System (EOS)	Jeff Schafer	EOS Worldwide	(972) 971-4197	jeff.schafer@eosworldwide.com
Managed IT Services	Travis Springer	Sagiss	(214) 679-4025	tspringer@sagiss.com
Commercial Real Estate: Office	Jo Thompson	LaTerra Commercial, LLC	(214) 728-1152	jo@laterracommercial.com
Investment Banker/ Mergers & Acquisition Firm	Dan Vermeire	Corporate Finance Associates	(214) 673-3205	dvermeire@cfaw.com
Security Consulting	Vince Vittatoe, CPP, CSC	Vittatoe Consulting, LLC	(972) 674-9557	Vince@VittatoeConsulting.com
401(k) Plan Provider	Mike Wallace	401 Plans	(214) 763-0269	mikew@401plans.com

BUSINESS PROS ROSTER - 3/3/2024

NEW MEMBERS (2024 STARTERS)				
BUSINESS PRO Category	BUSINESS PRO	Company	Phone Number	E-Mail Address
CPA Firm	Matt Anson	Matt D. Anson CPA, PLLC	(469) 815-2216	matt@ansoncpas.com
CEO Peer Group	Anthony Carter	Vistage Worldwide, Inc.	(469) 740-1827	anthony.carter@vistagechair.com
Commercial Printer & Graphic Design	Javier Creixell	Allegra Marketing Print and Mail	(469) 585-1558	javier@allegratx.com
Mergers & Acquisitions Advisor	Nolan Duck	DBG Advisors	(972) 200-0991	nolan@dbgadvisors.com
Fractional Chief Operating Officer	Susan Fennema	Beyond the Chaos	(214) 856-2016	susan@beyondthechaos.biz
Human Resource Systems Consulting	Steve Freeman	OCI-HR	(214) 770-4096	steve@ocihr.com
Small Business Change Management	Sheryl Hardin	Capacity Squared	(214) 457-8597	Sheryl@CapacitySquared.net
Data Analytics Software	Eric Harrison	4impactdata	(214) 707-3004	eharrison@4impactdata.com
Small Business Scaling Strategist	Leslie Hasler	Your Biz Rules	(972) 892-3385	leslie@yourbizrules.com
Financial Advisor / Life Insurance	Mark Kashar	Spectrum Financial Group	(214) 766-1792	mjkashar@financialguide.com
Human Resource Consulting	Mark Mitford	HR Catalyst	(214) 546-3241	MMitford@HRCatalystConsulting.com
Fractional Chief Financial Officer	Brian Moen	New Life CFO	(612) 354-0631	brianm@newlifefco.com
Sales Training and Leadership	Tom Niesen	Acuity Systems, Inc	(940) 368-9577	tom@salesmadeeasy.com
Commercial & Personal Workspaces	Chris Nieto	Vari, Inc.	(214) 564-4584	chris.nieto@vari.com
Business Broker / Business Value Enhancement	Rochelle O'Brien	Venture Opportunities, LLC	(972) 351-3645	robrien@bizdealmaker.com
Fractional Chief Financial Officer	Nauman Poonja	Accounovation	(832) 235-8802	Nauman.poonja@accounovation.com
Executive Search & H/R Consulting	Charlie Quinn	HumCap, Inc.	(469) 484-6039	cquinn@humcapinc.com
Fractional Chief Marketing Officer	Jon Rice	Chief Outsiders	(972) 489-1193	jrice@chiefoutsiders.com
Business Broker	Betty Schnauffer	Murphy Business Sales	(214) 850-6241	b.schnauffer@murphybusiness.com
Marketing Strategy	Randi Skinner	Value Building Marketing	(972) 697-8116	randi@ideasthatdentsuck.com
Marketing Agency	Heather Steele	Blue Steele Solutions	(214) 680-0654	heather@bluesteelsolutions.com
Bookkeeping and Staffing	Heather Weatherly	Hire Effect	(469) 592-8701	heather.weatherly@hireeffect.com

MEMBERSHIP CANDIDATES				
BUSINESS PRO Category	BUSINESS PRO	Company	Phone Number	E-Mail Address
Organizational Change Management	Tami Bishop	Motivus Business Results	(8328) 771-4936	tbishop@motivusresults.com
Fractional Business Development	Ron Bruno	BB+T Consulting	(310) 804-8243	ron@bbandtconsulting.com
Sales Consulting	Joe English	360 Consulting	(972) 841-9495	joe@360consultingdfw.com
Franchise Consulting	Rudy Federico	The Franchise Consulting Company	(214) 725-4867	Rudy@TheFranchiseConsultingCompany.com
Lead Generation & Virtual Assistants	Scott Henkin	Tek and Tel	(972) 814-7268	scott@tekandtel.com
Regional Commercial Bank	Jenny Johnson	Encore Bank	(972) 746-8010	jenny.johnson@bankencore.com
Certified Financial Planner	Kelly Kunst, CFP®	Fiscal Harmony	(214) 276-0808	kkunst@gswealthmgmt.com
Fractional Chief Information Officer	Cheryl Moody	GoCIO.net	(214) 577-7622	Cheryl.Moody@GoCIO.net
Registered Investment Advisor	Greg Schmitz	Copiam Wealth Management	(214) 725-5263	gschmitz@copiamwealthmanagement.com
Entrepreneurial Operating System (EOS)	Kevin Taylor	EOS Worldwide	(214) 289-6343	kevin.taylor@eosworldwide.com
Mergers & Acquisitions Attorney	Kevin Woltjen	Nelson Mullins Riley & Scarborough	(214) 505-0505	Kevin.Woltjen@NelsonMullins.com

BUSINESS PROS ROSTER - 3/3/2024

GUESTS				
BUSINESS PRO Category	BUSINESS PRO	Company	Phone Number	E-Mail Address
Regional Commercial Bank	Christina Bartlett	Encore Bank	(214) 491-0275	christina.bartlett@bankencore.com
Business Broker / Business Value Enhancement	Heather Hardaway	Venture Opportunities, LLC	(214) 574-9728	hhardaway@bizdealmaker.com
Executive Search & Recruiting	Jolene Risch	Risch Results	(972) 839-9447	jolenerisch@rischresults.com

UNFILLED PROFESSIONS	
----------------------	--

Asset Valuation Firm
Commercial Real Estate - Industrial
Corporate Expense Reduction
Employment Law Attorney
Large Employer Benefit Programs
M&A Transaction Attorney
Money Center (Mega) Bank
National Commercial Bank
Private Equity Provider