## Chicago 2024 Group Leader Summit Monday, October 28, 2024, 7:00 AM

Sheraton Universal Hotel 333 Universal Studios Dr. Universal City, CA 91608





Keith Allen (GL)
Of Counsel
Evans & Dixon LLC
Attorney

I am a seasoned commercial litigation attorney who resolves business disputes. I also assist growing businesses with outside general counsel services. 303 W. Madison Street, Suite 1900 Chicago, IL 60606 United States (312) 924-7279 kallen@evans-dixon.com www.evans-dixon.com

Group Leader Acceleration Meeting, Black Professionals Affinity Group, Chicago 7 (GL), Chicago Central, Chicago DEI,



Michael Batilaran (GL)
Partner - Commercial Banking
American Commercial Bank
Banking & Finance

Commercial banking done right. A trusted advisor & partner to business owners, going above & beyond the traditional banking relationship. Commercial loans, deposits, & treasury management solutions to help both the business & the owners reach their goals.

4733 Main St Lisle, IL 60532 United States (630) 536-0624 mbatilaran@acbandt.com acbandt.com

Naperville 1 (EC), Chicago Real Estate Affinity Group, Chicago Mergers & Acquisitions Affinity Group, Chicago South (GL), Group Leader Acceleration Meeting,



Mitchell Chaban (GL)
Partner
Latimer LeVay Fyock LLC
Attorney

I represent businesses and individuals in employment and workplace-related legal matters. I draft contracts, policies and procedures designed to avoid litigation. I prevail in court when necessary. 55 W Monroe Street – Suite 1100 Chicago, IL 60603 United States 312.667.1353 mchaban@llflegal.com

Lake County North, Chicago 8 (GL), Group Leader Acceleration Meeting,



Puneet Cham (GL)

Attorney Latimer LeVay Fyock LLC Attorney

Puneet is a Partner at Latimer LeVay Fyock LLC, a full service business law firm. He concentrates his practice in the areas of estate & business succession planning, trust & estate administration, and estate and trust litigation.

55 West Monroe Street Suite 1100 Chicago, IL 60603-5128 United States (312) 422-8000 pcham@llflegal.com www.llflegal.com

Chicago 7, Chicago 3 (GL), Chicago Estate and Succession Planning Affinity Group, Group Leader Acceleration Meeting,



Steve Fretzin

Four-time Author, Lawyer Coach and Peer Advisor FRETZIN, Inc Consultant & Service

Business development coach for attorneys who are highly motivated to grow their law practices. FRETZIN offers a "Crush-Course" Group, of coaching, training and accountability that gets results for our attorney clients.

180 N LaSalle Suite 3700 Chicago, IL 60601 United States (847) 602-6911 steve@fretzin.com www.fretzin.com

Group Leader Acceleration Meeting, Chicago 9, North Shore 1 (GL), Consultants & Coaches Affinity Group,



Steven Glick (AGL)
Broker
At Properties
Real Estate

Steven Glick, known for his intuitive and highly effective marketing and negotiation expertise, is one of Chicago's most indemand real estate agents. He guarantees that his clients receive dedicated care throughout the entire transaction.

347 West Chestnut #2401 Chicago, 60610 (773) 727-7879 stevenglick@atproperties.com www.atproperties.com

Chicago Real Estate Affinity Group (AGL), Group Leader Acceleration Meeting, Chicago 8,



Adam Grais (AGL)
Member
McDonald Hopkins LLC
Attorney

I advise clients on structuring business transactions with a focus on federal income tax issues. Other law firms often turn to me as co-counsel for their clients' tax matters.

300 North LaSalle Street Suite 1400 Chicago, IL 60654 United States (312) 642-1902 agrais@mcdonaldhopkins.com https://mcdonaldhopkins.com

Chicago Mergers & Acquisitions Affinity Group, Chicago Estate and Succession Planning Affinity Group (AGL), Chicago Central, Chicago Lawyers Affinity Group, Group Leader Acceleration Meeting,



Bob Green (GL)
Owner / Board Facilitator
The Alternative Board North Shore
Consultant & Service

A personal & practical approach to create and implement a strategic plan. Diagnosing before prescribing to prioritize: integration, delegation, accountability, and performance measures of stakeholder and company value. 1701 Golf Road, Bldg 3, Suite 300 Rolling Meadows, IL 60008 United States 847-651-4267 bob@tabnorthshore.com https://www.thealternativeboard.com/north-shore

Chicago 10, Schaumburg 1 (GL), Chicago Estate and Succession Planning Affinity Group, Group Leader Acceleration Meeting, Chicago Mergers & Acquisitions Affinity Group,



Shannon M. Hahn (AGL, EC, TM, ChiESP DEI Amb)

Pillar International Insurance Advisors Insurance

Independent insurance expert focused on complex disability, life insurance & long-term care solutions. Special needs niche. No-exam life & DI expertise for high earners. Education & service are hallmarks of our business for over 50 years.

150 S Wacker Drive Suite 2400 Chicago, IL 60606 United States (312) 415-6107 shannon.hahn@pillarintl.com

Group Leader Acceleration Meeting, Chicago Women's Affinity Group (AGL), Chicago Estate and Succession Planning Affinity Group, Chicago Central (TM), Chicago DEI, Chicago Mergers & Acquisitions Affinity Group,



**Brian Haussmann (GL)**Partner
Tabet DiVito & Rothstein LLC
Attorney

Brian is a trial lawyer and litigator who primarily represents private businesses and their owners in business dissolution cases (sometimes referred to as "business divorces") and other complex corporate governance and ownership disputes.

209 South LaSalle Street, 7th Flr. Chicago, IL 60604 United States (312) 762-9471 bhaussmann@tdrlaw.com http://www.tdrlawfirm.com/attorneys/bio/brian-c.-haussmann

Chicago 10 (GL), Group Leader Acceleration Meeting,



## Rick Hayhurst (GL, DEI Co-Chair, EC Chi 6) (he/him)

Managing Director BlitzBe Marketing Marketing

AI, ChatGPT, Digital marketing platform, Lead generation, CRM, Funnels, Automation, Text and email marketing, appointment scheduler, Social Media Management, Reputation Management, Plan, Audit 5357 N Clark Street, #2 Chicago, IL 60640 United States 773-368-7173 rick@blitzbe.com https://www.blitzbe-marketing.com/

Group Leader Acceleration Meeting, Chicago Real Estate Affinity Group, Chicago 11 (GL), Chicago DEI (Chair), Chicago 6 (EC),

## **Carrie Jung**

Regional Director - Chicago ProVisors Consultant & Service



I support our Chicago Group Leaders and serve as a resource to our ProVisors members.

740 Wiley Farm Court, Schaumburg, IL 60173 Chicago, IL 60605 United States (312) 513-0993 carriej@provisors.com www.provisors.com

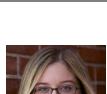
Chicago 1 (RD), Schaumburg 1 (RD), Chicago Real Estate Affinity Group (RD), Lake County North (RD), Naperville 1 (RD), Chicago Women's Affinity Group (RD), Chicago Lawyers Affinity Group (RD), Chicago Lawyers Affinity Group (RD), Chicago Central (RD), Chicago 2 (RD), Chicago 9 (RD), Chicago 6 (RD), Chicago 4 (RD), Chicago 3 (RD), Chicago 5 (RD), North Shore 1 (RD), Northwest 1 (RD), Chicago 12 (RD), Chicago 8 (RD), Chicago 10 (RD), Chicago 7 (RD), ProVisors (RD), North Shore 2 (RD), Chicago 13 (RD), Chicago Downtown (RD), Chicago 11 (RD), Chicago South (RD), Chicago DEI (RD),

## Thomas Latourette (GL, DEI Co-Chair) (he/him)

Managing Partner
M3 Learning
Consultant & Service

5509 Millstone Ln Rolling Meadows, IL 60008 United States (847) 528-2738 tom@m3learning.com www.m3learning.com

Tom specializes in Sales and Sales Management development. He helps organizations generate more revenue with stronger pipelines, a better sales process and stronger sales skills. He helps sales leadership metric, measure and motivate at new levels! Northwest 1 (GL), Chicago 1, Chicago Real Estate Affinity Group, Chicago Mergers & Acquisitions Affinity Group, Chicago DEI (Chair), Group Leader Acceleration Meeting,



Laura Liss (AGL, EC, GLA) Franchise & Business Attorney Liss & Lamar, P.C.

Attorney

I am a franchise and business attorney who helps new entrepreneurs and business owners with their franchising, buying or selling a business (M&A) including any franchise, commercial leases / real estate, trademarks, etc. I practice in Chicago and Denver.

1301 West 22nd Street, Suite 709 Oak Brook, IL 60523 United States (630) 571-1645 laura@lisslamar.com LissLamar.com

Chicago Real Estate Affinity Group, Chicago Lawyers Affinity Group, Chicago Women's Affinity Group, Group Leader Acceleration Meeting, Chicago Mergers & Acquisitions Affinity Group (AGL), Chicago 3 (GLA),



Richie Marrero (GL, EC, DEI Ambassador)

Specialist, Employer Sponsored Benefits 360 Benefits Insurance

We strategically partner with middle market companies helping to design employee benefits programs that control cost, guarantee compliance, and help attract, retain, and develop top talent. 20 N. Clark St. Suite 2825 Chicago, IL 60602 United States (773) 414-4914 rmarrero@360benefits.com https://www.360benefits.com/

North Shore 2 (GL), Chicago Central, Chicago DEI, Group Leader Acceleration Meeting,



Katy Mickelson (GL)
Divorce & Family Law Attorney

Beermann LLP
Attorney

Family law & divorce attorney, litigator & certified mediator, strategic, efficient & discrete resolution of actions for divorce, parentage, orders of protection, domestic violence, prenuptial/post-nuptial agreements

161N Clark Street Suite 3000 Chicago, IL 60601 United States (312) 621-4382 khmickelson@beermannlaw.com www.beermannlaw.com

Chicago Lawyers Affinity Group, Chicago DEI, Group Leader Acceleration Meeting, Chicago 4, Chicago Women's Affinity Group, Chicago Central (GL),



**Drew Powers (GL, EC)** 

Insurance and Investment Advisor Powers Financial Group Investment Advisor

Serving successful professionals, especially in Healthcare & Legal: Physicians, Dentists, Attorneys, to pay less in taxes, protect themselves & family should they get sick, injured, or pass away. I PROTECT your INCOME from INJURY, ILLNESS, & the IRS!

1700 Park Street Suite 203 Naperville, IL 60563 United States (630) 862-1003 drew@powersfg.com www.powersfg.com

Group Leader Acceleration Meeting, Chicago 4 (EC), Naperville 1 (GL), Tax Masters Affinity Group,



Dory Ann Rodriguez (GL)

Lifestyle Financial Planner HighPoint Planning Partners Investment Advisor

Lifestyle financial planning for busy professionals

233 N Ridgeland Ave
Oak Park, IL 60302 United States
(708) 406-7300
dory.rodriguez@hiptpartners.com
https://www.doryfinancialplanner.com/

Chicago Women's Affinity Group, Chicago 5 (GL), Chicago Estate and Succession Planning Affinity Group, Chicago Central, Group Leader Acceleration Meeting,



Ken Scales (GL)

CEO Scalesology Information Technology

Ken Scales is a senior business executive with over 20 years of management, business development and technology experience. As the CEO of Scalesology, he ensures businesses scale with the right technology solution.

10 South Riverside Plaza, Suite 875 Chicago, IL 60606 United States 3126366776 ken.scales@scalesology.com

Group Leader Acceleration Meeting, Chicago 8 (EC), Chicago Downtown (GL),



Jay Stefani (GL)
Managing Partner
Levinson and Stefani Injury Lawyers
Attorney

Attorney helping individuals and families who have suffered personal injury or wrongful death from truck, automobile, or bicycle crashes and accidents.

10 S. LaSalle St., Suite 1330 Chicago, IL 60603 United States (312) 376-3816 jay@levinsonstefani.com https://levinsonstefani.com

Group Leader Acceleration Meeting, Chicago 6 (GL),



Hillard Sterling (GL)
Partner
Roetzel & Andress
Attorney

Hillard Sterling is a litigator with thirty years of experience litigating technology issues of all kinds, including systemimplementation cases, software-license disputes, and privacy and cyber matters. 30 N. LaSalle St., Suite 2800 Chicago, IL 60602 United States (312) 962-8082 hsterling@ralaw.com

Chicago 9 (GL), Chicago 1, Group Leader Acceleration Meeting,



Nina Stillman (AGL) Senior Counsel Handler Law, LLP Attorney

I provide expert Domestic & International Estate Planning for business owners and their families. Planning encompasses asset protection, charitable giving, entity governance & management, & succession planning. We also probate & estate administration.

191 North Wacker Drive floor 23 Chicago, IL 60606 United States (312) 641-2100 nstillman@handler.law www.handler.law

Chicago 9, Chicago Estate and Succession Planning Affinity Group, Chicago Lawyers Affinity Group (AGL), Chicago Women's Affinity Group, Group Leader Acceleration Meeting,



Justin Strane (GL) (he/him)
Real Estate Transaction Law | Estate
Planning
Front Door Legal
Attorney

2502 N. Clark St. Ste. 236 Chicago, IL 60614 United States (312) 262-3636 justin@frontdoorlegal.com www.frontdoorlegal.com

Chicago 2 (GL), Chicago Real Estate Affinity Group, Group Leader Acceleration Meeting, Chicago Lawyers Affinity Group,