## DC/Metro Area & Baltimore 2024 Group Leader Summit Monday, October 28, 2024, 7:00 AM

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



Becky Aquino (GL) Division Lead, CFO Tenace, LLC Accountant

Accounting and compliance expert, former government auditor. Assisting government contractors with their bookkeeping and regulatory compliance needs.

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DCM Women's Affinity Group, DC/Metro 1, DC/Metro 7 (GL), Group Leader Acceleration Meeting,



Lamont Brown (AGL, GLA) Owner, Wealth Manager

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I am a CERTIFIED FINANCIAL PLANNER® (CFP®) professional with more than a decade of experience dedicated to helping executives and owners build a plan to achieve financial security.

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Group Leader Acceleration Meeting, DC/Metro 5 (GLA), Black Professionals Affinity Group, DCM Mergers & Acquisitions Affinity Group (AGL),



Mike Cammarata (GL) CFP, Partner Tide Creek Financial Group

business.

Investment Advisor Mike strategically protects growing businesses, attracts and retains key

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Group Leader Acceleration Meeting, DC/Metro 4, Baltimore 4 (GL), DCM Mergers & Acquisitions Affinity Group,



Larry Finkelberg (GL, EC)

Senior Mortgage Banker, Branch Manager Atlantic Coast Mortgage Banking & Finance

Serving those in need of any residential mortgage solutions and helping families manage their mortgage in the context of an overall financial plan to maximize wealth

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Group Leader Acceleration Meeting, DC/Metro 3 (EC), DC/Metro 6 (GL), DCM Real Estate Affinity Group (EC),



Becky Fleming (GL)

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Guides clients through all aspects of Family Law litigation, in addition to serving as a mediator, parent coordinator, and child's attorney.

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Baltimore 1, Baltimore 3 (GL), Group Leader Acceleration Meeting,



Morgan Florio
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Morgan Florio is the Regional Director for ProVisors - DC/Metro & Baltimore. My passion is to help senior-level executives and advisors to develop new relationships and be the best resource they can be for their clients.

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DCM Women's Affinity Group (RD), ProVisors (PV Staff),



Josh Glikin (GL) Partner Shulman Rogers Attorney

Solving intellectual property disputes, including federal court litigation, arbitration, and representation before the USPTO and the Copyright Office, regarding trademarks, copyrights, patents, trade secrets, advertising law, and unfair competition.

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DCM Lawyers Affinity Group, DC/Metro 3, Baltimore 1 (GL),



Brian Guenther (GL, EC) (he/him)
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DC/Metro 9 (GL), DC/Metro 6 (EC), Group Leader Acceleration Meeting,



Benjamin Inman (GL) Estate Planning Attorney Inman Law, PLLC Attorney

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I am an estate planning attorney at Inman Law, PLLC, a law firm committed to effective implementation of our clients' estate plans in collaboration with their other trusted advisors. 8609 Westwood Center Dr Ste 110, PMB 1010 Tysons Corner, VA 22182 United States (571) 766-8371 binman@inmanlawpllc.com https://inmanlawpllc.com

Northern Virginia 3 (GL), DC/Metro 5, DCM Lawyers Affinity Group, Group Leader Acceleration Meeting,



Valerie Kaiser (GL, TM) (she/her)

Financial Adviser EldenStreet Financial Investment Advisor

Dynamic Financial Advisor helping women, families, executives & business owners visualize and realize their financial goals. Financial Planning, Retirement Income Planning, Wealth Management, Exit Strategies, over 25 years experience.

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DC/Metro 1 (GL), Group Leader Acceleration Meeting, DC/Metro 7, Bay Area Women's Affinity Group, DCM Women's Affinity Group,



Micheal Lipshultz (GL)

Senior Vice President - Wealth Management, Financial Advisor Morgan Stanley Investment Advisor

Mike and his team focus on Financial Planning based wealth management strategies for families and business owners.

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Group Leader Acceleration Meeting, DC/Metro 2 (GL), Non-Profit Affinity Group,



Brian Lundeen (GL, EC) Forensic Accountant Grobstein Teeple LLP Accountant

I am a CPA with a specialization in forensic accounting and consulting, representing both commercial and individual interests, including family law.

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Group Leader Acceleration Meeting, DC/Metro 3 (EC), DC/Metro 5 (GL),



Seema Morse (GL) Workplace Investigator and Employment Attorney

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Spanish speaking workplace investigator and Meeting, DCM Lawyers Affinity Group, employment attorney.

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DC/Metro 3 (GL), Group Leader Acceleration



Daya Naef (GL) (she/her) CEO & Law Firm Co-pilot The Success Partner Consultant & Service

Boosting Your Law Career & Firm's Success: Leadership, Marketing Mastery, Legal Firm Growth, Attorney Coaching, Practice Management, Strategic Planning, Business Expansion, Effective Communication, Legal Business Strategy, and Professional Development

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Baltimore 6 (GL), Baltimore 1, Consultants & Coaches Affinity Group, Group Leader Acceleration Meeting,



Laura Nash (AGL, GLA) Relationship Manager/Vice President, CFP®

West Financial Services, Inc. Investment Advisor

Wealth advisor serving business owners, HNW families and especially women in transition. Focus on transforming complex financial issues into manageable plans. Provides financial planning and investment management, including philanthropic planning.

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DC/Metro 8 (GLA), DCM Women's Affinity Group (AGL), New York Women's Affinity Group, Group Leader Acceleration Meeting,



Edgar Ndjatou (GL) Principal

Officium, LLC Human Resources

I help organizations solve business problems through an HR lens. I work to understand the unique needs of each organization to develop customized solutions to help them achieve success.

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DC/Metro 11 (GL), DC/Metro 3 (EC), Non-Profit Affinity Group, Black Professionals Affinity Group, DCM Lawyers Affinity Group, Consultants & Coaches Affinity Group, DCM Mergers & Acquisitions Affinity Group, Group Leader Acceleration Meeting,



Zach Reichenbach (GL) Managing Member Paradigm Forensics Accountant

I practice in the fields of business valuation, forensic accounting and litigation support.

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Group Leader Acceleration Meeting, Baltimore 2 (GLA), DCM Mergers & Acquisitions Affinity Group, Baltimore 5 (GL),



Michael Shaw (GL) Founder and Managing Partner The Shaw Law Group Attorney

Michael advises financial advisors on M&A, regulatory compliance/risk management, is a former financial advisor, FINRA attorney, and CFP Board attorney.

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government investigations, and litigation. He Baltimore 1, Baltimore 2 (GL), DCM Lawyers Affinity Group, Group Leader Acceleration Meeting, DCM Mergers & Acquisitions Affinity Group,



Julie Simmons (GL) (she/her)

Managing Director Human Capital Strategic Consulting Human Resources

Julie Simmons is the Managing Director of Human Capital Strategic Consulting, a woman owned management consultancy focused on providing human resources solutions.

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DC/Metro 1, DCM Women's Affinity Group, Northern Virginia 2 (GL), Group Leader Acceleration Meeting,



Ryan Smith (GL)

Managing Member Ryan P. Smith Law, PLC Attorney

I help broker-dealers, registered investment advisers and their associates spend their time serving their clients, not the SEC, FINRA or a state regulator. DC8 Group Leader and DC5 member.

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DC/Metro 5, DC/Metro 8 (GL), DCM Lawyers Affinity Group, Group Leader Acceleration Meeting,



Cameronne Taillon (GL, EC)

Attornev Taillon Law PLLC Attorney

I am an award-winning Estate Planning Attorney licensed in DC and VA who believes that a well crafted estate plan is a love letter that you leave behind for your friends and family.

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Northern Virginia 1 (GL), DC/Metro 3, DCM Women's Affinity Group (EC), Group Leader Acceleration Meeting,



Roya Vasseghi (AGL) (she/her)

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I educate and advise employers and protect businesses.

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