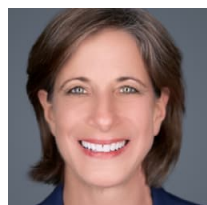


The Bay Area 2024 Group Leader Summit Monday, October 28, 2024, 7:00 AM

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



Christine Abato (GL)

Managing Director
Woodside Capital Partners
Financial Service

Managing Director at Woodside Capital Partners, a leading Mergers & Acquisitions (M&A) firm focused on sell or buy-side transactions for Tech companies \$20M-\$300M. FINRA Licensed Investment bank. Aerospace background, degree in Physics & an MBA

723 Temescal Way
Emerald Hills, CA 94062 United States
(408) 242-0181
cabato@monetavista.com
<https://woodsidecap.com/>

Silicon Valley Mergers & Acquisitions Affinity (EC), San Francisco 12 (TM), Bay Area Mergers & Acquisitions Affinity Group, Group Leader Acceleration Meeting, Menlo Park 1 (GL), Bay Area Women's Affinity Group, Silicon Valley Estate and Succession Planning Affinity Group,



Kim Appleby (GL) (she/her)

Principal
J&A Associates
Consultant & Service

Law firms & professional services business & management consulting; Certified Exit Planning Advisor (CEPA); succession planning; management & leadership transitions; delegation training; budgeting/cash flow/timekeeper productivity.

16000 Ventura Blvd., Suite 1000
Encino, CA 91436 United States
(510) 907-9934
kim@j-aassociates.com
<https://j-aassociates.com>

Group Leader Acceleration Meeting, East Bay Area Mergers & Acquisitions Affinity Group, Bay Area Women's Affinity Group, Oakland 1, Oakland 2 (GL), East Bay Women's Affinity Group,



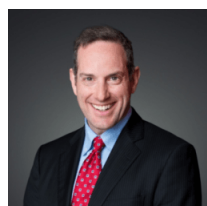
Gil Barrett (GL)

Managing Director
BMO Family Office
Investment Advisor

Wealth management planning in a collaborative and fiduciary culture for over two decades, I specialize in meeting the complex global investment needs of business owners, corporate executives, family offices, and private foundations.

180 Montgomery Street, 24th Floor
San Francisco, CA 94104 United States
(415) 640-7873
gil.barrett@bmo.com

Walnut Creek 2, Bay Area Middle Market Affinity Group, Silicon Valley Mergers & Acquisitions Affinity, San Francisco 7 (GL),



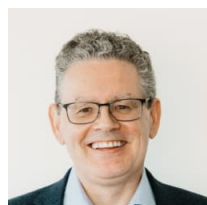
Dan Beck (GL)

Equitable Advisors
Investment Advisor

Dan is a financial advisor specializing in working with HENRYs (High Earners Not Rich Yet), young couples, and early stage entrepreneurs. He understands the financial challenges that the emerging affluent face, personally, and with their businesses.

275 Battery St. Suite 700
San Francisco, CA 94131 United States
(203) 536-2068
daniel.beck@equitable.com
www.jones-beck.com

Group Leader Acceleration Meeting, San Francisco 12, SF Estate & Succession Planning Affinity Group, Bay Area Distributors & Manufacturers Affinity Group, San Francisco 15 (GL),



Adrian Bray (AGL) (he/him)

CEO & Founder
Stellar
Consultant & Service

Business Growth, Exit Planning, Succession, Pre M&A preparation, Business Coaching, Business Consulting, Succession, Growth, Executive Coach, Middle Market, Equity Value, Operational Efficiency

2150 Portola Avenue, Ste D 115
Livermore, CA 94551 United States
4156909713
abray@consultstellar.com
www.adrianbray.com

Group Leader Acceleration Meeting, Bay Area Middle Market Affinity Group (AGL), Palo Alto 1, Bay Area International Affinity Group, Silicon Valley Mergers & Acquisitions Affinity,



Joseph Buenavista (GL)
Senior Vice President, Financial Advisor
Morgan Stanley
Investment Advisor

Joseph C. Buenavista, SVP, CRPC, is a
Financial Advisor at Morgan Stanley.

1576 Via Romero
Alamo, CA 94507 United States
(650) 687-2107
joseph.buenavista@morganstanley.com

Sacramento 2, San Jose 3 (GL), Group Leader
Acceleration Meeting,

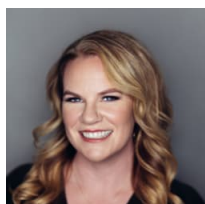


Andrea Christensen (GL)
Insurance Broker and GL of Santa Rosa 2
and Member of Larkspur
H.N. Christensen Insurance Brokers LLC
Insurance

We create unique insurance plans to meet the
specific needs of each client. We are a 100
year old brokerage that serves generations of
business, nonprofit, property owners and
individual clients. "You will understand
what you are paying for."

622 Petaluma Blvd. N.
Petaluma, CA 94952 United States
707-762-4700 x 207
andrea@hncins.com
www.hncins.com

Santa Rosa 2 (GL), Bay Area Women's Affinity
Group, Larkspur 1, Group Leader Acceleration
Meeting,



Louise Cochrane (GL, EC)
LF Cochrane & Associates
Accountant

Women business owners can be reactive
when addressing business and personal taxes
during tax preparation. I prefer
being proactive, when tax planning is
implemented throughout the year tax season
becomes the time to see the gains from best
laid plans.

2504 Santa Clara Avenue, Suite 4
Alameda, CA 94501 United States
(510) 985-9829
louise@lfcocrane.com
<https://www.lfcocrane.com>

Sacramento 2, Group Leader Acceleration Meeting,
Bay Area Real Estate Affinity Group, Bay Area
Women's Affinity Group, East Bay Women's Affinity
Group, Oakland 1 (GL),

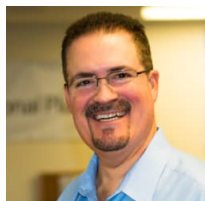


Amy Cole (AGL)
M&A Advisor, Certified Business Broker
ABI Group, M&A, Business Sales &
Valuations
Financial Service

Business Transactions are complex. Amy
specializes in the confidential sale of
privately-owned firms & business
valuations. She simplifies the exit process &
maximizes value utilizing a systematic
approach, customized marketing, strong
negotiation skills.

2010 Crow Canyon Place Suite 100
San Ramon, CA 94582-1772 United States
(925) 890-6012
acole@abi-ma.com
www.abi-ma.com

Walnut Creek 2, Group Leader Acceleration Meeting,
Silicon Valley Mergers & Acquisitions Affinity, East
Bay Area Mergers & Acquisitions Affinity Group
(AGL), Bay Area Women's Affinity Group,



Ed Correia (GL)
President
Sagacent Technologies
Information Technology

I protect businesses with sensitive data and
regulatory concerns. Whether preventing
issues or responding to breaches,
ransomware, fraud, or email compromise,
we deliver the IT management, security and
compliance solutions they need.

2010 El Camino Real # 766
Santa Clara, CA 95050-4051 United States
(408) 478-2597
ecorreia@sagacent.com
www.sagacent.com

Mountain View 1, San Jose 4 (GL), Bay Area
Distributors & Manufacturers Affinity Group, Group
Leader Acceleration Meeting,

**Gail Covington (GL)**

Executive Director
Morgan Stanley
Investment Advisor

Currently an Executive Director and Family Wealth Director with Morgan Stanley in SF.

101 California Street, 23rd Floor
San Francisco, CA 94111-5804 United States
415-693-6672
gail.covington@morganstanley.com

San Francisco 8 (GL), Group Leader Acceleration Meeting, Black Professionals Affinity Group, Bay Area Women's Affinity Group, Bay Area Mergers & Acquisitions Affinity Group,

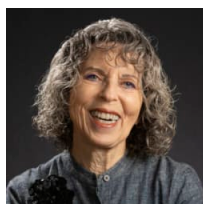
**Joe Delaney (GL)**

Managing Director, Principal
ROBERTSON STEPHENS®
Investment Advisor

We relish the opportunity to guide successful individuals and families to make smart decisions with their money and protect their financial future. We serve attorneys, executives and business owners.

455 Market Street, Suite 1600
San Francisco, CA 94015 United States
(415) 578-3160
joe.delaney@rscapital.com
<https://rscapital.com/>

Group Leader Acceleration Meeting, SF Estate & Succession Planning Affinity Group, San Francisco 1 (GL), San Francisco 3,

**Lanie Denslow (AGL, EC, DEI Co-Chair) (she/her)**

Principal
World Wise Intercultural Training & Resources
Consultant & Service

I train my clients to understand cultural nuances so they can work effectively with clients, employees, and partners wherever they are in the world.

San Jose, CA United States
213-249-4170
lanie@worldwiseonline.net
www.worldwiseonline.net

Northern California DEI (Chair), Silicon Valley Women's Affinity Group, Bay Area Women's Affinity Group, Bay Area International Affinity Group (AGL), San Jose 1 (EC), Bay Area Distributors & Manufacturers Affinity Group, International Business Affinity Group, Group Leader Acceleration Meeting,

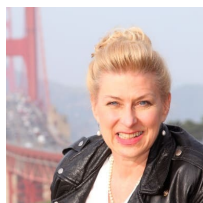
**Staci Drescher (GL)**

President, Attorney-Investigator
DCI Group
Consultant & Service

Savvy private investigator, workplace attorney and sleuth who finds hidden facts, evidence and assets during legal disputes, conducts impartial workplace misconduct investigations and gathers business intelligence for decision-makers.

4096 Piedmont Ave. #828
Oakland, CA 94611 United States
(510) 496-1070
staci@dcifacts.com
dcifacts.com

Group Leader Acceleration Meeting, Bay Area Lawyers Affinity Group, San Francisco 5 (GL), Bay Area Women's Affinity Group, Bay Area International Affinity Group, Silicon Valley Attorneys Affinity Group, Los Angeles Lawyers and Legal Professionals Affinity Group, East Bay Lawyers Affinity Group, San Francisco 1,

**Angela Dunz (GL, EC)**

Owner / Founder
Biz Dev Badass
Consultant & Service

Business Development on LinkedIn, Profile Optimization, Branding on LinkedIn, Content Strategy, LinkedIn Visibility, Public Speaking

103 1st Street
San Rafael, CA 94901 United States
(415) 419-1781
angela@angeladunz.com
<https://angeladunz.com/>

Bay Area Branding, Licensing, IP, & Strategic Services Affinity Group (EC), Group Leader Acceleration Meeting, San Rafael 2 (GL), Colorado Women's Affinity Group, Bay Area International Affinity Group, Larkspur 1, LGBTQ+ Allies Affinity Group, Consultants & Coaches Affinity Group, Bay Area Women's Affinity Group (EC),

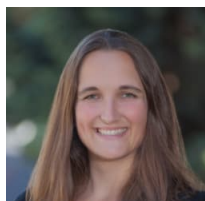
**Shawn Flynn (GL)**

Principal
Global Capital Markets
Banking & Finance

FINRA Licensed Investment Banker
Focused on Mergers & Acquisitions, Raising
Growth Capital, Secondary's and Host of
The Silicon Valley Podcast.

279 Thatcher Ln
Foster City, CA 94404 United States
415 952 3165
sf@globalcapitalmarkets.com
<https://www.globalcapitalmarkets.com/>

Group Leader Acceleration Meeting, Mountain View
1, Palo Alto 3 (GL),

**Jamie Ganly (GL)**

Commercial Loan Officer
Exchange Bank
Banking & Finance

1420 Rocky Ridge Drive Unit 190
Roseville, CA 95661 United States
831.252.4429
jamie.ganly@exchangebank.com

Bay Area Real Estate Affinity Group, Sacramento 1
(GL), Bay Area Women's Affinity Group, Group
Leader Acceleration Meeting,

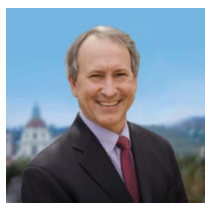
**David Goldenberg (GL)**

Founding Partner
VLP Law Group
Attorney

David is a corporate attorney. Using a
balance of business, legal and mind reading
skills he translates complicated legal matters
into easy to understand terms. Company
formation, investments, business transition,
general business legal needs.

246 Texas St.
San Francisco, 94107
415.354.2442
dgoldenberg@vlpawgroup.com

Group Leader Acceleration Meeting, Bay Area
Mergers & Acquisitions Affinity Group (AGL), San
Francisco 8, Bay Area Lawyers Affinity Group,

**Ed Goodson (GL)**

Estate and Trust Attorney
Lagerlof, LLP
Attorney

I guide heirs and beneficiaries after the loss
of a loved one and represent trustees,
executors, administrators, and guardians
managing estates over \$1M. My firm also
handles trust and estate disputes, along with
business and civil litigation.

100 El Dorado St.
Auburn, CA 95603 United States
(530) 328-1601
egoodson@lagerlof.com
<https://www.lagerlof.com/teams/edward-ed-goodson/>

Sacramento 2, Roseville 1 (GL), Group Leader
Acceleration Meeting,

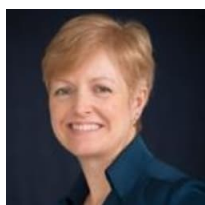
**Maria G Guardado (GL) (she/her)**

Mortgage Broker
Veridian Mortgage
Banking & Finance

Let my engineering background calculate
the best mortgage for you or your business
owners.

2975 Bowers Avenue, Suite 315
Santa Clara, CA 95051 United States
(408) 406-0285
maria@veridianmortgage.com
www.veridianmortgage.com

Silicon Valley Women's Affinity Group, Bay Area
Real Estate Affinity Group (EC), LGBTQ+Allies
Affinity Group, Mountain View 2 (GL), Group
Leader Acceleration Meeting, Northern California
DEI, San Mateo 2, Bay Area Women's Affinity
Group,

**Elva Harding (AGL, EC)**

Principal/Attorney
Harding Legal
Attorney

Real estate transactions, including
commercial leasing; purchase and
acquisition, and private residential sales.

2625 Alcatraz Avenue, #269
Berkeley, CA 94705 United States
415.967.7570
eharding@edhlegal.com

Group Leader Acceleration Meeting, Bay Area Real
Estate Affinity Group (AGL), Bay Area Lawyers
Affinity Group, Bay Area Women's Affinity Group,
San Francisco 14,

**Julia Holian (AGL)**

Career Strategist & Interview Coach
Career Transformation Partners
Consultant & Service

Julia is a Career Strategist and Interview Coach. She provides career direction, career planning, networking strategies, job search strategies, interview preparation and support, compensation negotiation, new job onboarding, and career success coaching.

2950 Buskirk Avenue, Suite 300
Walnut Creek, CA 94597 United States
(925) 451-3183
julia@careertransformationpartners.com
<https://www.careertransformationpartners.com>

Group Leader Acceleration Meeting, San Ramon 3, East Bay Women's Affinity Group (AGL), Silicon Valley Women's Affinity Group, South Bay Women's Affinity Group, New York Women's Affinity Group,

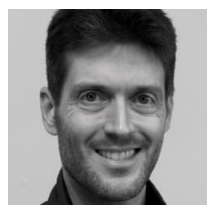
**Stafford Jacobs (GL, EC, DEI Co-Chair)**

Property and Casualty Insurance Advisor
CAL Insurance & Associates, Inc
Insurance

Seasoned commercial insurance professional, helping high-growth companies and their leaders scale their businesses unencumbered by risk.

314 West Portal Ave
San Francisco, CA 94127 United States
(415) 680-2125
stafford.jacobs@onedigital.com
www.myCALteam.com

Bay Area Real Estate Affinity Group (EC), Palo Alto 1, San Francisco 11 (GL), Black Professionals Affinity Group (EC), Northern California DEI (Chair), San Antonio 1, Group Leader Acceleration Meeting, Bay Area Middle Market Affinity Group,

**Steven Kahn (GL)**

Shareholder
Hoge Fenton
Attorney

A Dirt Lawyer Who Solves Problems. Litigation and trial attorney focused on disputes over real estate entities, ownership, use, control, and transactions. Deep experience with title, escrows, leases, boundaries, easements, and liens.

6801 Koll Center Parkway
Suite 210
Pleasanton, CA 94566 United States
(925) 460-3362
steven.kahn@hogefenton.com
<https://www.hogefenton.com/our-people/steven-j-kahn/>

Walnut Creek 3, Bay Area Lawyers Affinity Group, East Bay Lawyers Affinity Group, Bay Area Real Estate Affinity Group (EC), Pleasanton 1 (GL), Silicon Valley Attorneys Affinity Group, Group Leader Acceleration Meeting,

**Ganesh Kalyanaraman (GL)**

Attorney at Law
Global Visa Counsel
Attorney

Counseling clients on a full range of matters: non-immigrant visas, permanent residency, and citizenship. I have counseled large Fortune 500 companies, mid-sized companies & small businesses in I-9 Audits and M&A Due Diligence.

916 Second Street
Second Floor
Sacramento, CA 95814 United States
8449758472
ganesh@globalvisacounsel.com
www.globalvisacounsel.com

Sacramento 3 (GL), Group Leader Acceleration Meeting, East Bay Lawyers Affinity Group, San Ramon 2, Bay Area International Affinity Group (EC), Northern California DEI, Silicon Valley Attorneys Affinity Group,

**Bharat Kanodia (GL)**

Founder and CEO
Veristrat LLC
Financial Service

Valuations for - PE/VC portfolios; 409a; ESOPs; gift & estate tax

6754 Bernal Avenue, Suite 740134
Pleasanton, CA 94566 United States
(415) 423-4300
bkanodia@veristrat.com
www.veristrat.com

Group Leader Acceleration Meeting, San Ramon 1, Walnut Creek 1 (GL),

**Jen Lee (GL;GLA;EC)**

Legal Disruptor
Lawyer Success Network
Consultant & Service

Once a mild-mannered attorney (said no one ever), now a super hero for lawyers who want to challenge the status quo. Alter ego is Rebel Esquire.

111 Deerwood Road Suite 200
San Ramon, CA 94583-4445 United States
925-586-6738
jen@lawyersuccessnetwork.com
www.lawyersuccessnetwork.com

Oakland 3 (GL), Group Leader Acceleration Meeting, East Bay Lawyers Affinity Group (TM), San Ramon 3 (EC), Bay Area Women's Affinity Group, East Bay Women's Affinity Group, Consultants & Coaches Affinity Group, Silicon Valley Attorneys Affinity Group, Bay Area Lawyers Affinity Group,

**Steve Lee (GL)**

Vice President, Global Advisory &
Transaction Services
CBRE
Real Estate

Steve provides real estate strategy, planning and execution to companies by leveraging CBRE's global platform of best-in-class research, brokerage and specialized consulting services. Portfolio Optimization | Cost Reduction | Value Creation | M&A

415 Mission Street
46th Floor
San Francisco, CA 94105 United States
(415) 772-0345
steve.lee@cbre.com
www.cbre.us

Group Leader Acceleration Meeting, San Francisco 10 (GL), Bay Area Real Estate Affinity Group, Menlo Park 1,

**Sam Lee (GL, EC)**

Mortgage Loan Officer - NMLS ID: 450819
US Bank - Private Mortgage Banking
Banking & Finance

One person's problem is another person's ideal client. Bring me problems and I will help you turn them into networking influence that will bring commerce back to you. As a banker I also seek people who need construction, purchase & refi mortgages.

1 California Street 2000
San Francisco, CA 94111-5400 United States
(415) 371-9314
sam@workonreferrals.com

San Francisco 14, San Jose 2 (GL), Group Leader Acceleration Meeting, Palo Alto 1,

**Michelle C. Lerman (EC,GL)**

Attorney
CunninghamLegal/formerly Lerman Law
Partners, LLP
Attorney

Experienced Trust and probate attorney for nearly 30 years. Southern Ca and No. Ca. SuperLawyers 2009, 2010, 2017 - 2023 Author "Create Your Best Legacy", "A wise attorney with a heart" UCLA BA, USC JD

999 Fifth Avenue, Suite 200, San Rafael, CA 94901
San Rafael and Orange County, CA 94901-3026
United States
415-308-3640
mlerman@cunninghamlegal.com
<https://www.realestateinvestorlaw.com/create-my-estate-plan/>

San Francisco 11, San Francisco 6 (GL), Bay Area Lawyers Affinity Group, Century City 3 (TM), Bay Area Women's Affinity Group, Bay Area Real Estate Affinity Group, SF Estate & Succession Planning Affinity Group, Group Leader Acceleration Meeting,

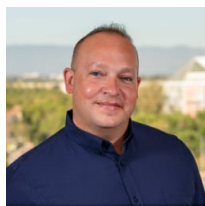
**Stephen F Lovell (AGL)**

President
Lovell Wealth Management
Investment Advisor

Stephen is a nationally recognized retirement expert who works with wealthy clients. "When my clients retire they want stable, reliable income, and no worries."

819 Villa Vista Court
Emerald Hills, CA 94062 United States
(415) 254-8719
stephen@lovellwm.com
<http://www.lovellwealthmanagement.com>

Silicon Valley Mergers & Acquisitions Affinity, Menlo Park 1 (TM), Silicon Valley Estate and Succession Planning Affinity Group (AGL), Group Leader Acceleration Meeting,

**Sean McLean (GL) (he/him)**

Fractional CIO
LoHi Advisors
Consultant & Service

Fractional CIOs assist businesses with their Strategic Technology Decisions & Process Planning. Many of my clients do not have a CIO or IT Director, so I help their management team work with IT vendors and staff to execute change and maximize efficiency.

846 College Dr
San Jose, CA 95128 United States
408.439.9420
sean@lohiadvisors.com
<https://lohiadvisors.com>

SoCal Cannabis Affinity Group, San Jose 1 (GL), Bay Area Cannabis Affinity Group (EC), Group Leader Acceleration Meeting,

**Monika Miles (GL)**

President
Miles Consulting Group Inc
Consultant & Service

We specialize in multi-state tax solutions and address state income tax & sales tax issues for our clients. We provide peace of mind to clients navigating the ever-changing multi-state tax landscape.

3150 Almaden Expressway Suite 110
San Jose, CA 95118-1250 United States
4082662259
monika@milesconsultinggroup.com

Silicon Valley Mergers & Acquisitions Affinity, Silicon Valley Women's Affinity Group (GL), San Jose 1, Group Leader Acceleration Meeting,

**Celine Mui Simon (GL) (she/her)**

Sales Associate, Retail Division
TRI Commercial
Real Estate

East Bay commercial real estate broker specializing in retail leasing, and mixed use property development. Ex-attorney known for negotiation skills, caring, responsive & creative approach offers complimentary valuation and market analysis.

1777 Oakland Blvd, Suite 220
Walnut Creek, CA 94596 United States
415.509.5803
celine.simon@tricommercial.com
www.tricommercial.com

Oakland 1, Walnut Creek 3 (GL), Bay Area Women's Affinity Group, SF Estate & Succession Planning Affinity Group, Bay Area Real Estate Affinity Group, East Bay Women's Affinity Group, Group Leader Acceleration Meeting,

**Mark Peters (GL)**

Employment Law & Mediation
Duckworth & Peters, LLP
Attorney

Mark represents individuals on employment matters ranging from discrimination and harassment to overtime and wage and hour disputes. Mark also serves as a private mediator on employment matters.

351 California Street Suite 700
San Francisco, CA 94104 United States
(415) 433-0328
mark@duckworthpeters.com
www.duckworthpeters.com

San Francisco 13 (GL), Bay Area Lawyers Affinity Group, San Francisco 1, Group Leader Acceleration Meeting,

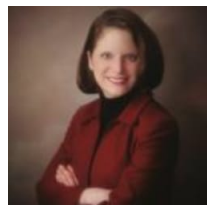
**Keley Petersen (GL) (she/her)**

Founder and C.E.O.
Willow Grove Advisors, LLC
Investment Advisor

WGA is independent with fiduciary responsibility, offering tailored wealth management services to entrepreneurs, engineers, global individuals and their families.

1919 Addison Street, Suite 101
Berkeley, CA 94704 United States
(510) 705-1771
keley@willowgroveadvisors.com
www.willowgroveadvisors.com

SF Estate & Succession Planning Affinity Group, Silicon Valley Women's Affinity Group, Palo Alto 1 (GL), Bay Area International Affinity Group (EC), San Jose 1, Group Leader Acceleration Meeting, San Francisco 2,



Kristie Prinz (GL)
Principal
THE PRINZ LAW OFFICE
Attorney

Business lawyer/attorney with international practice focusing on business contracts/transactions and advice in software, SaaS, AI, tech, IT, privacy, hardware, digital health, healthtech, life sciences, IP licensing; trademark/copyright registration.

6203 San Ignacio Avenue, Suite 110
San Jose, CA 95119 United States
(408) 884-3577
kprinz@prinzlawoffice.com
<https://www.prinzlawoffice.com>

Silicon Valley Mergers & Acquisitions Affinity, Healthcare Advisors Affinity Group, San Jose 2, PNW M&A/Corporate Deal Makers Affinity Group, DCM Mergers & Acquisitions Affinity Group, Silicon Valley Virtual 1 (GL), Group Leader Acceleration Meeting, East Bay Lawyers Affinity Group, Silicon Valley Attorneys Affinity Group,



Mark Punzalan (GL)
Partner & Head of Litigation | Chan + Punzalan | San Francisco, California
Chan Punzalan LLP
Attorney

Mark is the Head of Litigation at Chan + Punzalan where he leads the firm's litigation matters in the areas of trade secrets, copyrights, trademarks, founders' disputes, and commercial litigation. He also serves as the Group Leader for Palo Alto 2.

22 Battery Street, Suite 800
San Francisco, CA 94111 United States
(650) 481-8112
mark@chanpunzalan.com
<https://www.chanpunzalan.com/bio-mark-punzalan>

San Francisco 10, Silicon Valley Attorneys Affinity Group, Palo Alto 2 (GL), Bay Area Lawyers Affinity Group, Group Leader Acceleration Meeting,



Constantino (Tony) Quintong (GL)
CEO
Securieon Group
Consultant & Service

Fractional CEO-Advising privately held companies in a serious pivot. Objective-achieve a higher valued business for sustainable growth today and future exit. Business Analysis|Strategy|Mergers|Acquisitions|Finance|Operations|Market|Sales |Leadership

7881 Church Street Suite F
Gilroy, CA 95020 United States
(949) 244-5133
tony@securieon.com
<https://securieongroup.com/>

Silicon Valley Mergers & Acquisitions Affinity, San Ramon 1 (GL), Sacramento 2, Group Leader Acceleration Meeting, San Jose 1, Bay Area International Affinity Group,



Saja Raof (GL)
Border Wall Destroyer
Saja Raof, Inc. Law Corp.
Attorney

Business immigration attorney taking aspiring Americans from visa application to pledge of allegiance.

100 Pine St., Ste. 1250
San Francisco, 94111
(415) 890-5760
sar@sar.law
www.sar.law

East Bay Women's Affinity Group, Larkspur 1, Bay Area Lawyers Affinity Group, Bay Area Women's Affinity Group, Bay Area International Affinity Group, San Francisco 14 (GL), Group Leader Acceleration Meeting (GL),



Michelle Roberts (GL)
Principal
Roberts Disability Law, P.C.
Attorney

I am an ERISA litigation (employee benefits) attorney who represents individuals in disputes concerning private short-term and long-term disability, and life insurance benefits. I represent plan participants and insureds in employee benefit plans.

66 Franklin Street, Ste. 300
Oakland, CA 94607 United States
(510) 230-2090
michelle@robertsdisability.com
www.robertsdisability.com

San Francisco 5, Bay Area Women's Affinity Group, San Francisco 4 (GL), Bay Area Lawyers Affinity Group, Group Leader Acceleration Meeting,

**Roger Royse (AGL;EC) (he/him)**

Partner
Haynes and Boone, LLP
Attorney

Roger practices in the areas of corporate and securities law, domestic and international tax, mergers and acquisitions, and fund formation.

525 University Ave
Palo Alto, CA 94301 United States
(650) 245-3406
roger.royse@haynesboone.com
www.haynesandboone.com

Palo Alto 1 (EC), Silicon Valley Mergers & Acquisitions Affinity (AGL), Group Leader Acceleration Meeting,

**Ruben Ruiz (AGL)**

Managing Attorney
Law Offices of Ruben P. Ruiz PC
Attorney

Ruben is a commercial and real estate litigator. He represents clients in multimillion-dollar matters involving breach of contract, partnership/ shareholder disputes, and investor fraud.

1155 N. First St. STE 111
San Jose, CA 95112 United States
(866) 448-4989
rruiz@rubenruizlaw.com
<http://www.rubenruizlaw.com/>

East Bay Lawyers Affinity Group, Silicon Valley Attorneys Affinity Group (AGL), Silicon Valley Mergers & Acquisitions Affinity, Group Leader Acceleration Meeting, Santa Clara 1,

**Krystalynn Schlegel (GL) (she/her)**

Insurance Agent
MG Schlegel & Associates
Insurance

Specializing in guiding business owners and individuals manage risk and protect wealth using life, disability and long term care insurance products.

7595 Redwood Blvd., Suite 220
Novato, CA 94945 United States
415-898-2030
kmschlegel@mgschlegelassociates.com
www.mgschlegelassociates.com

Group Leader Acceleration Meeting, Larkspur 1 (GL), SF Estate & Succession Planning Affinity Group, Bay Area Women's Affinity Group, Santa Rosa 2,

**Audrianna Sibiski (GL)**

Private Wealth Advisor
Morgan Stanley
Investment Advisor

I help wealthy people meet their financial goals with strategy, investments, lending, and estate planning so they can continue focusing on their passions in life; such as changing the world through their company and creating a legacy for their family.

555 California Street, 14th Floor
San Francisco, CA 94104 United States
(517) 862-4945
audrianna.sibiski@morganstanley.com
<https://www.morganstanley.com/>

SF Estate & Succession Planning Affinity Group, San Francisco 12 (GL), Bay Area Women's Affinity Group, Group Leader Acceleration Meeting, East Bay Women's Affinity Group, San Francisco 14,

**Phyllis Simon (AGL) (she/her)**

Attorney
Garcia & Gurney, ALC
Attorney

Phyllis is a business transactions attorney and workplace investigator. Her areas of practice encompass business transactions, mergers and acquisitions, entity formations, commercial real estate transactions and a host of other business issues.

6600 Koll Center Parkway, Ste 200
Pleasanton, CA 94566 United States
(925) 223-6573
psimon@garciagurney.com

Bay Area Women's Affinity Group, Bay Area Distributors & Manufacturers Affinity Group (TM), San Ramon 1, East Bay Lawyers Affinity Group, Black Professionals Affinity Group (AGL), Northern California DEI (EC), Group Leader Acceleration Meeting,

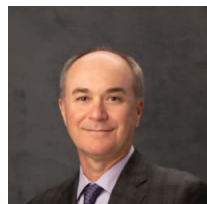
**Ralph Sklar (AGL)**

Principal
Silver Transitions
Insurance

As Principal and Financial Adviser at Silver Transitions, I am privileged to work alongside some of the top financial professionals in the nation to help our clients protect their families, ensure business continuity, and conserve their wealth. We work w

425 Market Street Suite 1610
San Francisco, CA 94105-2403 United States
(415) 839-9640
rsklar@silvertransition.com

Group Leader Acceleration Meeting, SF Estate & Succession Planning Affinity Group (AGL), San Francisco 5,

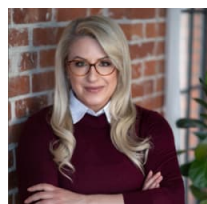
**Terry Szucsko (GL)**

Family Law Attorney
Lvovich & Szucsko P.C.
Attorney

Certified family law specialist. Divorce, annulment and separation, prenuptial and antenuptial agreements, domestic partnership, child custody, and visitation, spousal support, and child support, domestic violence, and restraining orders.

50 Osgood Pl. Suite 1001
San Francisco, CA 94133 United States
(415) 392-2560
terry@landslawgroup.com
www.landslawgroup.com

Group Leader Acceleration Meeting, Bay Area Lawyers Affinity Group, San Francisco 3 (GL), Oakland 1,

**Regina Unegovsky (AGL)**

Senior Attorney
Regal Tax & Law Group, PC
Attorney

Tax controversy matters with a focus on effective negotiation with the IRS, FTB, CDTEFA and city agencies.

4 Embarcadero Center Suite 1400
San Francisco, 94111 United States
(415) 360-5850
regina@regaltaxlaw.com

Group Leader Acceleration Meeting, San Francisco 10, Bay Area Cannabis Affinity Group (AGL), Bay Area Women's Affinity Group, SoCal Cannabis Affinity Group, Bay Area Lawyers Affinity Group,

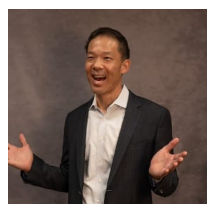
**Amit Urban (AGL)**

Registered Representative
Fortitude Investment Group
Real Estate

I specialize in Delaware Statutory Trusts (DST) 1031 Investments. I work with rental property owners that are seeking to sell their property but are concerned about potential tax bill, future management responsibilities, and estate planning issues.

800 W. El Camino Real, Suite 180
Mountain View, CA 94040 United States
(650) 282-0477
aurban@fortitudeinvestments.com

Santa Clara 1, Silicon Valley Real Estate Affinity Group (AGL), Group Leader Acceleration Meeting,

**Richard Wang (GL;GLA;EC)**

(he/him)
Mortgage Broker
Veridian Mortgage, LLC
Banking & Finance

Mortgage broker and attorney with the knowledge, experience, program suite and Disney Insitute-level service to assist first-time buyers, self-employed, or retired applicants. Ask me about obscure French varietals, Susan Komen fundraising & B-flat chords

2975 Bowers Avenue, Suite 315
Santa Clara, CA 95051 United States
(408) 828-5609
richard@veridianmortgage.com
www.veridianmortgage.com

Silicon Valley Attorneys Affinity Group, Group Leader Acceleration Meeting, Sacramento 1 (GLA), Newport Center 2, LAX/Long Beach Real Estate Affinity, Bay Area Lawyers Affinity Group, LGBTQ+Allies Affinity Group, SF Estate & Succession Planning Affinity Group, Mountain View 1 (GL), San Jose 4 (EC), San Francisco 6, Bay Area Real Estate Affinity Group,



Carter Welch (GL)
 Business Sherpa: Coach, Consultant,
 Branding, New Products
 Shirlaws Group & Fig Tree Group
 Consultant & Service

We guide owners to grow revenue, profit and company value. I've led Sales & Marketing for companies in many industries. I've also owned a company and know how it feels to be an owner, alone, wrestling with issues of growth, culture, people, time & profit.

1460 Escalero Road
 Santa Rosa, CA 95409 United States
 (707) 339-2842
 carter.welch@shirlawsgroup.com
 www.carterwelch.com

Bay Area Branding, Licensing, IP, & Strategic Services Affinity Group, Santa Rosa 1 (GL), Group Leader Acceleration Meeting, Bay Area Distributors & Manufacturers Affinity Group (TM), Larkspur 1 (GLA), SF Estate & Succession Planning Affinity Group,



Kelly Woodruff (AGL)
 Certified Appellate Law Specialist
 Complex Appellate Litigation Group
 Attorney

I am a certified Appellate Law Specialist, and represent clients in appeals and writs in virtually all subject matters, from business litigation, to probate and family law litigation.

125 Blackfield Dr.
 Tiburon, CA 94920 United States
 415.649.6700
 kelly@kwoodrufflaw.com
 www.calg.com

East Bay Lawyers Affinity Group, Group Leader Acceleration Meeting, San Francisco 5, San Francisco 8 (GLA), Bay Area Lawyers Affinity Group (AGL), Bay Area Women's Affinity Group, Silicon Valley Attorneys Affinity Group,