



# THRIVE IN 25

## CVBBA 2025 CONFERENCE

**Embassy Suites by Hilton, 201 Harrison Oaks Blvd, Cary NC**

### TUESDAY, 9/23/25

### Event

### Location

8:00 AM - 7:00 PM	Registration	Entrance Area
8:30 AM - 12:30 PM	IBBA Course #120 (4 credit hours) Tax Issues Every Business Broker Needs to Know- Part II <b>Monty Walker</b>	Cape Hatteras
12:30 - 1:00 PM	Lunch - <b>Sponsored by CVBBA (Lunch for IBBA Course Attendees)</b>	Cape Hatteras
1:00 - 5:00 PM	IBBA Course #120 (4 credit hours) Tax Issues Every Business Broker Needs to Know- Part III <b>Monty Walker</b>	Cape Hatteras
4:00 - 4:45 PM	The Ins and Outs of Seller Notes <b>GBank, Gulf Coast, SouthState Bank, Truliant FCU (Sponsors)</b>	Biltmore/Hope
4:00 - 4:45 PM	How to Leverage Your BizBuySell Membership to Accelerate Deal Flow <b>Sponsor: BizBuySell</b>	Bellamy
4:00 - 4:45 PM	NextGen: Business Brokerage - 4 Core Elements to Build a Highly Successful Brokerage Business <b>IWEN Members: Heather Valeri, Colette Kemp, Patricia Griswold</b>	Mendenhall
5:00 - 5:45 PM	Positioning Your Buyer for SBA Financing <b>Bank of Oak Ridge, Dogwood State Bank, Community Bank &amp; Trust, Northwest Bank (Sponsors)</b>	Biltmore/Hope
5:00 - 5:45 PM	Win More Listings and Close More Transactions by Understanding Any Industry <b>Sponsor: Vertical IQ</b>	Bellamy
5:00 - 5:45 PM	Wealth Management Considerations for Sellers <b>Sponsor: Roxbury Wealth Advisors of Raymond James</b>	Mendenhall
5:00 - 6:00 PM	CVBBA Board Meeting	Kitty Hawk
6:00 PM	CVBBA Welcome Reception and Dinner - <b>Sponsored by PLG Law</b>	Triangle Ballroom
7:30 PM	Trivia Competition <b>Sponsors: Live Oak Bank, PLG Law, Fidelity Bank and First National Bank</b>	Triangle Ballroom

### WEDNESDAY, 9/24/25

6:30 AM	Hot Breakfast (Hotel Guests)	Atrium/Restaurant
7:30 AM	Registration	Entrance Area
7:45 - 8:15 AM	First Time Attendee Orientation <b>Van Daughtry, AJ Ramsey, Donna Mariani</b>	Bellamy/Mendenhall
8:30 - 9:00 AM	Welcome & Opening Remarks <b>Van Daughtry</b>	Chimney Rock
9:00 - 9:50 AM	Keynote Speaker - The Outlook for the U.S. Economy <b>Sonya Ravindranath Waddell, VP and Economist, Regional and Community Analysis, Federal Reserve Bank of Richmond, VA</b>	Chimney Rock
10:00 - 10:45 AM	Creative Transaction Structuring, Using the Latest SBA Changes <b>Steve Mariani</b>	Bellamy/Mendenhall
10:00 - 10:45 AM	AI, Automation and the Future of Deal-Making <b>Colette Kemp and Ron West - Sponsor: Deal Studio</b>	Biltmore/Hope
10:45 - 11:15 AM	Break with Sponsors - <b>Sponsored by Huntington Bank</b>	Chimney Rock/Prefunction
11:20 - 12:05 PM	Valuation Insights - The Top Five Facts Brokers Need to Know <b>Jim Turner, Michael Goddard</b> <b>Sponsor: Fidelity Bank</b>	Bellamy/Mendenhall
11:20 - 12:05 PM	Exit Planning - Starting the Conversation Early <b>Neal Isaacs, Mike Leannah Sponsor: Business Value Strategies</b>	Biltmore/Hope
12:10	Lunch <b>Sponsored by First National Bank</b>	Chimney Rock
12:30 - 1:30 PM	Deal or No Deal: SBA Case Studies from the Trenches <b>Mark Pompeo Sponsor: Live Oak Bank</b>	Chimney Rock
1:30 - 2:15 PM	Selling Distressed and Underperforming Businesses <b>Mike Keen, Anthony Velez</b> <b>Sponsor: Huntington Bank</b>	Bellamy/Mendenhall
1:30 - 2:15 PM	Franchise Success Strategies for Brokers <b>Dustin Zeher, Peter Hanna Sponsor: Hopler Hanna</b>	Biltmore/Hope
2:20 - 3:00 PM	Maximizing Your CVBBA/IBBA Joint Membership <b>Emily Bowler and AJ Ramsey</b>	Chimney Rock
3:00 - 3:25 PM	Break with Sponsors - <b>Sponsored by CVBBA</b>	Chimney Rock/Prefunction
3:30 - 4:15 PM	Working with Buyers <b>Joe Moorman, Robert Lightner - Sponsor: Huntington Bank</b>	Bellamy/Mendenhall
3:30 - 4:15 PM	Scaling Up: Brokers and the Path to Bigger Deals <b>Moderator: Justin Sandridge, Tony Khoury, Tad Cook</b> <b>Sponsor: PLG Law, Mark Pompeo Sponsor: Live Oak Bank</b>	Biltmore/Hope
4:20 - 5:20 PM	Panel - Inside the Deal: What Your Trusted Advisors Want You to Know <b>Moderator: Van Daughtry, Sponsors: Tad Cook - PLG Law, Mike Leannah - Business Value Strategies</b> <b>Mark Moreno - First National Bank, Erica Parker - Fidelity Bank, Steve Preda - Summit OS Group</b>	Chimney Rock
5:30 - 7:30 PM	Evening Reception, Dinner and Drinks <b>Sponsored by Live Oak Bank</b>	Triangle Ballroom
7:30 - 8:30 PM	<b>Comedian - Andy Forrester</b>	Triangle Ballroom

### THURSDAY, 9/25/25

6:30 AM	Hot Breakfast (Hotel Guests)	Atrium/Restaurant
7:45 - 8:30 AM	SBA Moving Forward <b>Moderator: Van Daughtry, Sponsors: Mark Pompeo - Live Oak Bank, Michael Goddard - Fidelity Bank, Mark Moreno - First National Bank</b>	Chimney Rock
8:30 - 9:20 AM	Keynote Speaker - <b>JOLT! Yourself &amp; Your LinkedIn - Larry Long, Jr, LLJR Enterprises</b>	Chimney Rock
9:20 - 9:45 AM	Break with Sponsors	Chimney Rock/Prefunction
9:45 - 10:30 AM	Deal or Disaster: Managing Legal Risk in Business Transactions <b>Moderator: Rick Chess, Sponsors: Tad Cook - PLG Law, Peter Hanna - Hopler Hanna</b>	Bellamy/Mendenhall
9:45 - 10:30 AM	Digital Marketing Strategies for Brokers <b>Neal Isaacs, Heather Valeri</b>	Biltmore/Hope
10:35 - 11:20 AM	Recasting Financials: Adjusting for Reality <b>Robert Fisher, Chuck Riker Sponsor: First National Bank</b>	Bellamy/Mendenhall
10:35 - 11:20 AM	Industry Specialties: Broker-to-Broker Insights <b>Moderator: Ben Shaw, Terry Espy, Hal Feder, Alan Horn</b>	Biltmore/Hope
11:30 - 12:30 PM	Lunch <b>Sponsored by Fidelity Bank</b> ; Top Producer Awards and Raffle	Chimney Rock
12:30 - 1:30 PM	Panel - Building a Deal Team That Closes <b>Moderator: JT Tatem; John Chaffee, Tad Cook, Sponsor - PLG Law, Dennis Wagner, Sponsor - First National Bank, Randy Watsek, Sponsor - Roxbury Wealth Advisors of Raymond James</b>	Chimney Rock
1:30 - 2:00 PM	Vision for 2026 <b>AJ Ramsey</b>	Chimney Rock
2:00 PM	Wrap Up <b>Van Daughtry</b>	Chimney Rock
2:30 - 5:30 PM	Transworld Business Advisors Meeting	Biltmore/Hope

# Welcome to the 2025 CVBBA Annual Conference!



## Van Daughtry, 2025 President of the CVBBA

For over 20 years, we've supported business brokers and trusted advisors by providing business education, promoting ethical standards, and encouraging collaboration. This year's theme is "Thrive in 25."

Our conference features two IBBA courses toward your CBI designation, pre-conference workshops, and insightful speakers like Sonya Waddell from the Federal Reserve Bank of Richmond and motivational speaker Larry Long, Jr. You'll also find great main stage and breakout sessions on various industry topics.

For entertainment, join our trivia night on Tuesday. On Wednesday, don't miss our main event with comedian Andy Forrester, a Raleigh native.

We're so glad you're here. We wouldn't be the organization we are without you. Enjoy the conference, make new connections, embrace old friends, and prepare yourself and your practice to "Thrive"!



## Keynote Speaker Sonya Ravindranath Waddell

**Sonya Ravindranath Waddell** joined the Research Department of the Federal Reserve Bank of Richmond in January 2008. She oversees the regional and community development research area within the department. Her responsibilities include running surveys of businesses and other organizations, directing and engaging in analysis on economic and community development issues, analyzing and providing information on regional and national economic trends, and directing the incorporation of regional information into the Richmond Fed's monetary policymaking process.

She received a B.A. from Williams College and an M.S. in Applied Economics from the University of Wisconsin-Madison. She currently serves on the boards of the Virginia Association of Economists, the YWCA of Richmond, the Virginia Early Childhood Foundation, and the Virginia Opera. She is also a member of the Joint Advisory Board of Economists for the Commonwealth of Virginia.



## Keynote Speaker Larry Long Jr.

**Larry Long Jr.**, CEO (Chief Energy Officer) of LLJR Enterprises, is focused on motivation, inspiration, and most importantly, transformation through his Keynote Speaking and Emcee Programs. Larry has been recognized as a 4x Salesforce 'Top Sales Influencer', serving as a LinkedIn Influencer and Sales Thought Leader. He also hosts the weekly live show, 'Midweek MIDDAY Motivational Minute', and is Author of the Amazon best-selling book, 'JOLT! Get Zapped Into Intentionality: Rediscover and Believe In Your Inner Greatness'. Larry is a former college athlete (baseball at the University of Maryland).



## Comedian - Andy Forrester

**Andy Forrester** has been leaving audiences in stitches for over 25 years. His Dry Bar Comedy Special, *Most of This Is Baby Fat*, was released in 2019 and has been seen by millions. He's also been featured on *Stand Up Nashville! Live from Zanies and Pure Flix Comedy All-Stars*, hosted by Louie Anderson.

He has worked with such legends as Jimmie "JJ" Walker, Leanne Morgan, Marc Maron, Tom Segura, and many more. Andy's show is a non-stop ball of energy that will leave your cheeks hurting from laughing so hard.

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