



Welcome!

IEEE Financial Summit

February 9, 2024, 6 am PST

Live Stream from Seattle Washington



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Speaker Line up

6:00 am PST IEEE Announcements

6:05 am PST IEEE Introduction of all speakers

6:10 am PST Honghai Song, CEO and Founder at Canyon Magnet Energy, HTS REBCO Magnet

7:00 am PST Nick Knutzen, Senior Account Executive, Cloud AI/ML Partnerships IO Connect Services

7:25 am PST Craig Dickens, Merit Investment Bank, Mergers and Acquisitions

7:50 am PST Kyle Gillette, Helping Business Owners Be More, Blue Shirt Coaching

8:15 am PST Ali A. Criss-Kemp, CFP CEO, 'Employee Retention Key Employees', Financial Insight

8:40 am PST Bryce Yonker, Executive Director, Grid Forward; various advanced energy and grid technology

9:05 am PST Daniel Robles, 'Virtuous Circle Concept', owner, director, Co-Engineers, LLC

9:30 am PST Salute to our Speakers

9:35 am PST IEEE Prize Pack Giveaway

Welcome our speakers:

Honghai Song, CEO and Founder at Canyon Magnet Energy, HTS REBCO Magnet

Bryce Yonker, Executive Director, Grid Forward; various advanced energy and grid technology endeavors

Kyle Gillette, Helping Business Owners Be More, Blue Shirt Coaching

Ali A. Criss-Kemp, CFP CEO, 'Employee Retention Key Employees: Retirement Benefits', Financial Insight

Nick Knutzen, Senior Account Executive, Cloud AI/ML Partnerships IO Connect Services

Daniel Robles, 'Virtuous Circle Concept', owner, director, Co-Engineers, LLC

Craig Dickens, Merit Investment Bank, Mergers and Acquisitions

PROGRAM

We thank our sponsors:

IEEE Consultant Network Seattle





Honghai Song

Mr. Song is an experienced Scientist with a demonstrated history of working in the research industry and national laboratory. Skilled in Magnetics (Design and Measurement), High Tc Superconductor, Thin Films, Materials Science, Superconducting Magnet, Finite Element Analysis, Measurement and Automation, and Data Acquisition (LabVIEW). Strong research professional with a Ph.D. focused on Electrical Engineering and Applied Superconductivity from Florida State University and National High Magnetic Field Laboratory.

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Nick Knutzen

Through his experience in digital strategy, transformation, and enablement, he operates at the intersection of business and technology and helps his customers achieve their business outcome goals as a converged strategic partner. His strengths lie in his strong skill sets in business acumen, building relationships and trust, analytical thinking, and broad technical acumen. He has his AWS ASA certification, is skilled in customer relationship management, and is proficient in DevOps. Nick specializes in thought Leadership and Data Science & Analytics. He is proficient in cloud computing, he has business acumen, leadership, project management, digital transformation, communication, emotional intelligence, cross-functional collaboration, business, and technical acumen.

<https://www.linkedin.com/in/nknutzen/>





Craig Dickens

JD Merit guides successful business owners in the complex process of creating wealth and extracting value from their businesses through dream exits, strategic acquisitions, or raising growth capital. If your company is above \$20M, we will help you get to the next level or your next act! Is your net worth tied up in your business and you want to unlock liquidity to pursue new challenges, diversify wealth, retire, or enjoy more freedom? We have helped many business owners go from millionaires "on paper" to multi-millionaires "in the bank", enabling them to pursue their passions and live the life they want. Has your business hit a plateau, struggling with profits, or impacted by the current situation or a market trend? We have pioneered a proven rapid value building methodology called Grow Fast & Exit Profitably!® which has helped business owners achieve oversized exit values. For those owners not ready to sell their business, JD Merit provides access to growth capital to fuel your growth. Are you wondering how to exit/sell well? When is the right time? How to unlock liquidity in a way that you will not regret down the road? How to find someone with the right relationships with buyers? We are experienced advisors and un intimidated negotiators that help you to extract the maximum value from the business that you have poured your life's work into. HOW ARE WE DIFFERENT? Over 90% of our clients receive above-market prices for their companies upon sale, typically in 150 days. We close 97% of the deals past the Letter of Intent stage. We know what it takes to succeed at the negotiating table and share the entrepreneurial spirit of our clients. We deliver WINS, not just manage a process, and we won't stop until the deal is DONE. Our relentless team of dealmakers has arranged more than \$10 Billion in value in more than 275 transactions. Awarded Boutique Investment Bank of the Year 2015 and again in 2021, and dozens of additional industry awards. Your business means too much to trust it to a traditional M&A bank that only focuses on "engineering a sale" as a singular event. Selling your business for maximum value is a process, not an event, and thus it requires a strategic plan built by experts with vision, the experience, and the tenacity to get overmarket deals done.

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7:50 am PST Kyle Gillette, 'The Assumption that Leads to a Fortune' Blue Shirt Coaching



Kyle Gillette

Assumptions usually hurt us as business owners and leaders, but this one empowering assumption is the exception to the rule. Kyle Gillette will share with us how starting this step in empowering others opens the door to powerful possibilities, insights, and revenue. Sometimes it's the simple things that make businesses the most successful.

Mr. Gillette is a 4x business owner, an NLP master practitioner, a John Maxwell coach, and the creator of the B.L.U.E. Shirt Leadership Framework. He is the author of three books, including Right Now Leadership -- A 4-Part Framework for Today's Leader. Kyle has over 15 years of coaching experience focusing on helping men of faith and business owners shift their mindsets and habits to become the leaders they are meant to be. When not working, he enjoys being active with CrossFit, hiking, mountain biking, and spending time with friends and family.

<https://www.linkedin.com/in/kyle-gillette/>



8:15 am PST Ali A. Criss-Kemp, CFP CEO, ", Financial Insight 'Retention Key Employees: Benefits'



Ali A. Criss-Kemp

Ali will speak in a Q & A fashion on retention of key employees to include retirement, disability, health/dental care, employee buy in/stock options & incentivizing of key personnel. In a time where the unemployment rate is at all-time lows, retaining key next generation talent is key. Bring your questions.

Ali is the CEO, CCO & Owner of PNW based regional RIA, Financial Insights Wealth Management. Financial Insights was founded in 1981 and for over 40 years has been woman owned and operated. Under Ali's leadership, the firm has been recognized as one of the fastest growing RIAs in the nation, and in 2022 Ali was recognized as 40 under 40 by Investment News Magazine. She serves as the firm's Chief Compliance Officer and holds the CFP® designation. She currently leads a team of 17 amazing staff and is working on progressing the industry towards ethical business leadership, inclusive team dynamics & creating a firm that serves all stakeholders: clients, local community, and employees. FIWM serves high net worth & ultra-high net worth families in 26 states across the United States. Ali created and facilitated the Wisdom with Women Speaker Series which features Puget Sound area female financial, tax & estate professionals in a free educational forum for the Puget Sound Community.

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8:40 am PST Bryce Yonker, Executive Director, Grid Forward; various advanced energy grid technology



Bryce Yonkers

The session would cover trends in funding grid modernization. It will dive into the funding opportunities in motion with recent federal programs including from the US DOE Grid Deployment Office. Unprecedented levels of resources are in motion to support adding flexibility and resilience to the grid. Bryce will cover how initial rounds of programs (such as GRIP and USDA New Era) have been going and what is coming up around the corner soon.

As the executive director & CEO for Grid Forward Bryce leads strategic development, industry engagement, programs, and operations. He was a founder and original board member of the organization, with a mission to accelerate grid modernization and innovation, dating back to 2009. He is also the principal for Enertec Development, a energy and tech consultancy and is an advisor to energy growth companies. Bryce previously served as the senior director of business development & strategy for Clean Edge, a leading cleantech market research and advisory firm. He holds a bachelor's degree in business administration from Pepperdine University and an international MBA from IE in Spain. In his spare time, Bryce enjoys spending time with his wife and two children and being outdoors with a fly-rod in hand or skis on his feet.

<https://www.linkedin.com/in/bryceyonker/>





The Virtuous Circle: A bank will not finance a project unless every aspect is insured. An insurance company will not underwrite a project unless it is properly engineered. Engineering cannot be performed without financing. If any of these conditions cannot be met, the project will fail. Conversely, if all conditions are met, development flourishes. Herein lies the virtuous circle – possibly the most important Artificial Intelligence application yet to be built.

Dan Robles has thirty-five years of practical engineering experience across the aerospace, building construction, and technology industries. Bachelor of Science in Mechanical Engineering and master's degree in international business administration. He serves as an expert Witness at the intersection of mechanical engineering, international business practices, and standard of care for legal disputes nationwide. His early career he served as a design and test engineer on commercial aircraft, military aircraft, spacecraft, including several years with the Space Shuttle. Dan is also the founder of The Ingenesist Project developing a platform using game theory, blockchain, and Artificial Intelligence to convert intangible assets to a more tangible form.

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Thank You!

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