

2025

REPORT

IMPACT

WAKE FOREST UNIVERSITY CENTER FOR PRIVATE BUSINESS



WAKE FOREST UNIVERSITY

CENTER for
PRIVATE BUSINESS

Spanning the Mountains to the Coast

This year has been transformative—a true testament to the resilience, vision, and collaborative spirit of North Carolina’s privately-held business community. Our mission is to enable privately-held businesses to thrive by helping them to achieve the dreams for their business, family, employees, community, and stakeholders. In 2025, we did not just meet this mission; we expanded its reach significantly.

Strategic Growth and Unprecedented Reach



This year, the Center solidified its position as a statewide resource, growing to serve 230+ Member and Sponsor companies. **Our geographic footprint now spans five major market concentrations**, a critical expansion that ensures more leaders across the state can access our unique resources. We successfully launched our newest regional hub in Asheville and Western North Carolina, building on the momentum in the Triad,

Triangle, Charlotte, and Wilmington. This growth is not merely a matter of numbers; it is about extending the promise of Pro Humanitate—for humanity—into every corner of our state’s economy.

The Power of Peer-to-Peer Wisdom

The core of the Center’s experience remains the connection. **In 2025, we facilitated 22 highly confidential Business Leader Forum Groups across the state.** These Forums are often described by members as their “personal board of advisors,” providing a safe, structured space for leaders to address challenges in four crucial domains: **Business, Family and Friends, Personal Health, and Pressing Matters.** This peer-to-peer collaboration is the irreplaceable engine driving personal and organizational growth for our members.

“This growth is not merely a matter of numbers; it is about extending the promise of Pro Humanitate—for humanity—into every corner of our state’s economy.”

Programming Focused on the Future

Our educational programming, workshops, and high-caliber speaker events were meticulously curated to address the complexities faced by today’s business leaders.

A highlight of the year was hosting former Truist CEO, Kelly King, who shared his profound insights on shifting from a management mindset to one of teaching and purpose-driven leadership.



We also remain deeply committed to equitable access to resources. This year, through the generous support of our sponsors, the **Opportunity Fund** successfully assisted under-resourced owners, ensuring financial barriers do not prevent promising businesses from accessing the guidance they need to succeed.

Looking Ahead

Now in 2026, the Center is poised for deeper impact. We will continue to leverage our unique position within the Wake Forest University School of Business to deliver world-class content, foster deeper peer connections, and serve as the essential resource for private businesses seeking sustained, multi-generational success.

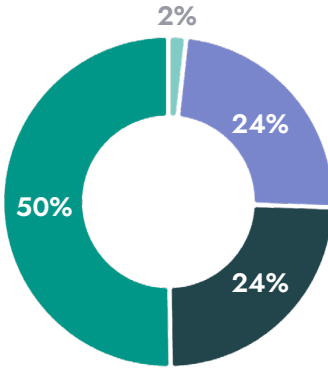
Thank you to our dedicated staff, our insightful academic partners, our essential Sponsors whose contributions fund our operations, and most importantly, our Members. Your commitment to building better businesses—and stronger communities—is the true impact we celebrate.

Dana Alligood
EXECUTIVE DIRECTOR

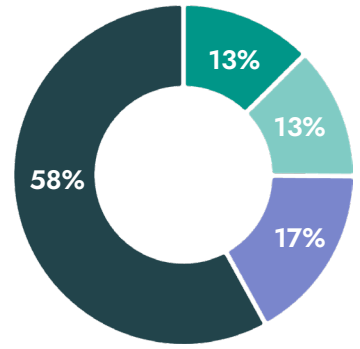


FISCAL YEAR 2025
JUNE 2024-JUNE 2025
2025

The Center for Private Business includes 230+ businesses and Sponsors across North Carolina with an annual membership that grants access to monthly speakers, professional development opportunities and peer-to-peer advisory boards.



MEMBERS & SPONSORS BY MARKET GEO



MEMBERS & SPONSORS BY EMPLOYEE SIZE

+56

NEW COMPANIES JOINED IN FY 2025

+18

NEW FORUM MEMBERS ADDED IN FY 2025

+2

NEW MARKET AREAS LAUNCHED

231

TOTAL MEMBER & SPONSOR COMPANIES

158

TOTAL FORUM MEMBERS

27

EVENTS IN FY 2025 ACROSS NC

New! Wilmington & Eastern NC

LAUNCHED IN FEBRUARY 2025



Spearheading in Eastern North Carolina is Kevin Hicks. Kevin is an accomplished senior leader who previously served as the Chief Operating Officer of a family-owned business and has first-hand experience in the for-profit and nonprofit sector. Kevin's strong relationships in the Wilmington area (as well as an alumni of Wake Forest University!) will go towards building up the Forum Program and founding our roster of Center Members along the East Coast.

"Forum provides such a safe space: a confidential circle of seasoned owners and a structure to help you run an intentional, growth-minded business. I'm honored to bring the Center's guidance and the opportunity to enter a Forum to leaders on the East Coast."



Over the course of 2024 and 2025 the Center for Private Business worked to establish our connections and contacts in the Wilmington area and up the East Coast. In March of 2024, Center staff met firsthand with business owners by hosting a Membership and Forum Interest Session to evaluate the opportunity for expansion.

We found family-owned businesses and senior leaders who were eager for the confidential, facilitated guidance of Forum Groups and leadership development of Center programming. In February of 2025 the Center proudly announced our entrance into the Wilmington and Eastern North Carolina market.

"Expanding into a fourth market area represents the value of the Center's work," said Dana Alligood, Executive Director of the Center for Private Business. "We're grateful for the continued support from our Sponsors that has allowed us to welcome Eastern North Carolina into our network."

"The right time to start thinking about a succession plan is at least 10 years before it happens. It takes many years to formulate the best path forward, and then it takes many years to execute the plan."

A Forum Peer Group has been super helpful. There is no substitute for someone who has already walked the walk ahead of you, and I'm grateful for the Center's expansion into Wilmington to provide this support to other businesses."



Ken Dull, Founder & Chairman
MCKINLEY BUILDING CORPORATION

New! Asheville & Western NC

LAUNCHED IN AUGUST 2025

"We are thrilled to be partnering with The Center for Private Business at Wake Forest. Years ago, business leaders like George Groome and Lou Bisette helped shape what was then the Family Business Forum at UNC Asheville."

Our ongoing commitment to family-owned and private business development in Western North Carolina was the driver behind this unique partnership between our public university and Wake Forest."



Dr. Kimberly van Noort
CHANCELLOR, UNC ASHEVILLE

Asheville has long been a city deeply-rooted in craftsmanship and commerce. When exploring the next foothold for The Center for Private Business, it was a natural choice to select Asheville and Western North Carolina.

"Many of our Member companies already work within the Blue Ridge Mountains and the University of North Carolina Asheville has been a valuable bridge to students and alumni leaders," said Dana Alligood, Executive Director of the Center for Private Business. "We are excited to engage with UNC Asheville to reconnect with former Family Business Forum companies. There is a long history of family businesses in the region, and our goal is to continue providing programming and workshops to help the communities thrive and support the next generation of leaders."



Note that our New Members for Fiscal Year 2025 joined between June 2024 and June 2025. New Members who joined after this time will be recorded in our 2026 issue, including companies from the Asheville market.

"From Asheville to Boone to the foothills, each community has a distinct entrepreneurial spirit rooted in resilience and innovation. I'm honored to represent this region and help connect its business leaders to the Center's powerful network of resources, relationships, and educational opportunities that support long-term success." Scott Fowler, Western NC Market Manager

Scott Fowler, Founder of BruceMont Communications, joins the Center with 35 years of experience in public relations and community engagement. Scott graduated from UNC Asheville and has an outstanding track record of assisting with economic development.



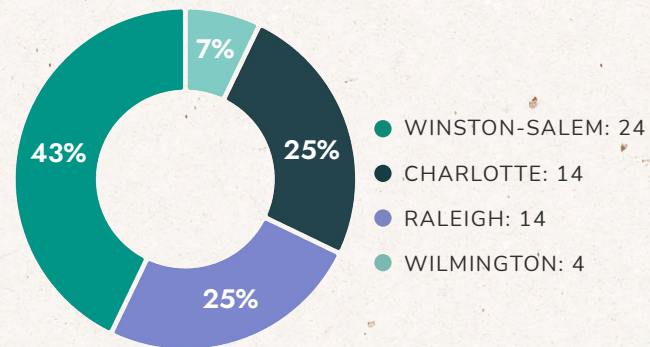


Who joined this year?

WE WELCOMED 56 NEW MEMBER AND SPONSOR COMPANIES ACROSS THE CAROLINAS!

Your recommendation is invaluable!

Our New Member growth primarily comes from word-of-mouth. If you know a leader or company that would benefit from Center Membership, connect them to our team or invite them to an event.



56 NEW MEMBERS & SPONSORS
JUNE 2024-JUNE 2025















+24 IN WINSTON-SALEM
& THE TRIANGLE

+14 IN THE CHARLOTTE
AREA

+14 IN RALEIGH
& THE TRIANGLE















+4 IN WILMINGTON
& EASTERN NC

Charlotte Area

	Boomtown CIO CHARLOTTE, NC TECHNOLOGY
	360 Aviation Advisors HUNTERSVILLE, NC FINANCIAL SERVICES
	Bank of America WINSTON-SALEM, NC FINANCIAL SERVICES
	Business North Carolina CHARLOTTE, NC MEDIA
	Capitala Investment Group CHARLOTTE, NC FINANCIAL SERVICES
	CBS Marketing Solutions, Inc. GREER, SC MARKETING & PRINTING SERVICES
	Next Conversation Consulting CHARLOTTE, NC BUSINESS CONSULTING AND SERVICES
	PNC Bank CHARLOTTE, NC FINANCIAL SERVICES
	Point B CHARLOTTE, NC TECHNOLOGY
	Ravenel New Media Consulting, LLC CHARLOTTE, NC MARKETING & PRINTING SERVICES
	Regions Bank CHARLOTTE, NC FINANCIAL SERVICES
	Toth Shop CHARLOTTE, NC MARKETING & PRINTING SERVICES
	Wade's Restaurant, Inc. SPARTANBURG, SC FOOD AND BEVERAGE SERVICES
	Wilmar, Inc. CHARLOTTE, NC BUSINESS CONSULTING SERVICES















Wilmington & Eastern NC

Raleigh & the Triangle











	BFG BURTON, OH RETAIL
	Anderson Legal, PLLC RALEIGH, NC LEGAL SERVICES
	Lakemont Investments RALEIGH, NC REAL ESTATE
	McAdams CHAPEL HILL ARCHITECTURE AND PLANNING
	Mpac3 Advisory Group ZEBULON, NC BUSINESS CONSULTING AND SERVICES
	Ragsdale Liggett, PLLC RALEIGH, NC LEGAL SERVICES
	Reiser CANTON, MA FOOD AND BEVERAGE SERVICES
	Southco Distributing GOLDSBORO, NC MANUFACTURING & DISTRIBUTION
	Stratus Business Advisors KENSINGTON, MARYLAND BUSINESS CONSULTING AND SERVICES
	Visions Realized, LLC RALEIGH, NC BUSINESS CONSULTING AND SERVICES
	Well Care Health RALEIGH, NC HEALTH CARE
	Wilkinson Supply Company RALEIGH, NC RETAIL
	Williams Realty & Building Company RALEIGH, NC CONSTRUCTION
	Zadell Development, LLC CARY, NC REAL ESTATE

	910 Advisors WILMINGTON, NC TECHNOLOGY
	EDDA Consulting, LLC WILMINGTON, NC BUSINESS CONSULTING AND SERVICES

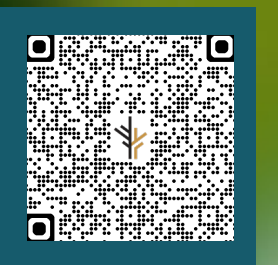
Winston-Salem & the Triad

	AIA Winston Salem WINSTON-SALEM, NC ARCHITECTURE AND PLANNING
	Beaufurn, LLC HIGH POINT, NC FACILITIES SERVICES
	Beco, Inc. HIGH POINT, NC FACILITIES SERVICES
	Blue Ridge QSC Management, Inc. SUMMERFIELD, NC FOOD AND BEVERAGE SERVICES
	Caffey Distributing GREENSBORO, NC FOOD AND BEVERAGE SERVICES
	CarneyCo JAMESTOWN, NC BUSINESS CONSULTING AND SERVICES
	Crazy Running WINSTON-SALEM, NC ORGANIZATIONS
	Dogwood Tax & Advisory ASHEBORO, NC FINANCIAL SERVICES
	FEDlogic, LLC WINSTON-SALEM, NC HEALTH CARE
	GenCrest Capital Partners GREENSBORO, NC FINANCIAL SERVICES
	Home Real Estate Company, Inc. WINSTON-SALEM, NC REAL ESTATE
	InfraPros, LLC GREENSBORO, NC FACILITIES SERVICES
	JBD Insight WINSTON-SALEM, NC BUSINESS CONSULTING AND SERVICES
	LongRun Solutions WINSTON-SALEM, NC BUSINESS CONSULTING AND SERVICES

	S Bryan Durham WILMINGTON, NC HEALTH CARE
	Wilmington Media + Marketing WILMINGTON, NC MEDIA

	Omega Construction, Inc. WINSTON-SALEM, NC CONSTRUCTION
	Reece Bottling and Canning WINSTON-SALEM, NC FOOD AND BEVERAGE SERVICES
	Samet Corporation GREENSBORO, NC CONSTRUCTION
	Sugar Mamas Movement WINSTON-SALEM, NC ORGANIZATIONS
	Tardigrade Technology HIGH POINT, NC TECHNOLOGY
	Trust Company of the South WINSTON-SALEM, NC FINANCIAL SERVICES
	Unique Background Solutions MT. AIRY, NC BUSINESS CONSULTING AND SERVICES
	Vela Strategic Marketing & Public Relations WINSTON-SALEM, NC MARKETING & PRINTING SERVICES
	Wells Fargo WINSTON-SALEM, NC FINANCIAL SERVICES
	Wilburn Medical Supply KERNERSVILLE, NC HEALTH CARE

Note that our New Members for Fiscal Year 2025 joined between June 2024 and June 2025. New Members who joined after this time will be recorded in our 2026 issue, including companies from the new Asheville market.



*Preview the entire
Member Directory!*



"Coffee with Kelly King: Lessons in Leadership"



Enrichment and Continued Education Hosted for Our Members

Many programming recordings can be found in our Member Portal.

4 PANELS

"The Intersection of Policy and Tax Legislation Impacting Businesses with FEUSA" August 27, 2024

"The Inclusive Leadership Handbook and Underestimated in Partnership with The Diversity Movement" September 18, 2024

"The Strategic Argument for Sustainability: The Case for Your Business" Oct. 23, 2024

"Coffee with Kelly: Lessons in Leadership from the Former CEO of Truist" April 7, 2025

7 NETWORKING EVENTS

Raleigh "Summer Social" July 11, 2024

Charlotte "Summer Social" July 16, 2024

Winston-Salem "Summer Social" July 18, 2024

Wilmington "Summer Social" June 18, 2025

"Open House with HUSTLE Winston-Salem" June 18, 2025

Raleigh "Summer Social" June 24, 2025

Winston-Salem "Summer Social" June 26, 2025

12 WORKSHOPS

"Board Bootcamp: Utilizing Highly Effective Corporate Governance" Sept. 11, 2024

"Forum Training: Strategies of an Outstanding Moderator" Sept. 25, 2024

"What Happens Next? DEI&B Training Through Desserts" October 10, 2024

Raleigh "Redefining & Measuring Productivity in Today's Workplace" October 30, 2024

Winston-Salem "Redefining & Measuring Productivity in Today's Workplace" November 5, 2024

Charlotte "Redefining & Measuring Productivity in Today's Workplace" November 7, 2024

Charlotte "Choosing Growth: Building Your Value Creation Engine" February 11, 2025

Winston-Salem "Choosing Growth: Building Your Value Creation Engine" February 12, 2025

Raleigh "Choosing Growth: Building Your Value Creation Engine" February 13, 2025

"A Day at the Truist Leadership Institute: Navigating Opposing Perspectives as an Executive" March 4, 2025

"At-Will Employment Won't Save You from a Discrimination Lawsuit: 7 Ways to Avoid Liability" April 3, 2025

"Background Checks & Drug Screenings: What HR Needs to Know in 2025" April 24, 2025



"How FDY, Inc. is Revolutionizing Travel Dining"



"4 Generations of Dressing N.C. with Kannon's Clothing"



2 WEBINARS

"Hosting Student Interns: A 1-Hour Guide on Crafting a Meaningful Internship" December 10, 2024

"How to Shine Online in 2025: A Marketing Brainstorm for Professional & Business Posting" January 23, 2025

2 LEGACY LUNCHEONS

"100 Years & 4 Generations of Dressing N.C. with Kannon's Clothing" December 5, 2024

"Doubling Revenue by Streamlining Operations: How FDY, Inc. is Revolutionizing Travel Dining" May 7, 2025

13 WINSTON-SALEM PROGRAMS

6 RALEIGH PROGRAMS

5 CHARLOTTE PROGRAMS

2 VIRTUAL PROGRAMS

1 WILMINGTON PROGRAM

27 TOTAL EVENTS FROM JUNE 2024-JUNE 2025

★= top 10 most attended programs!



PROGRAMMING DURING FY 2025, JUNE 2024-JUNE 2025



Cultivating Effective, Compassionate Leaders

THE CENTER FACILITATES 22 PEER GROUPS ACROSS N.C.

“The active creation of the life you want.”

How Drew Hancock, Forum Advisory Board Leader, describes the work done in Forum



Forum participation transforms how business leaders approach both challenges and opportunities. In our peer learning groups, executives move beyond isolation to gain honest feedback, strategic clarity, and accountability that drives real business results.

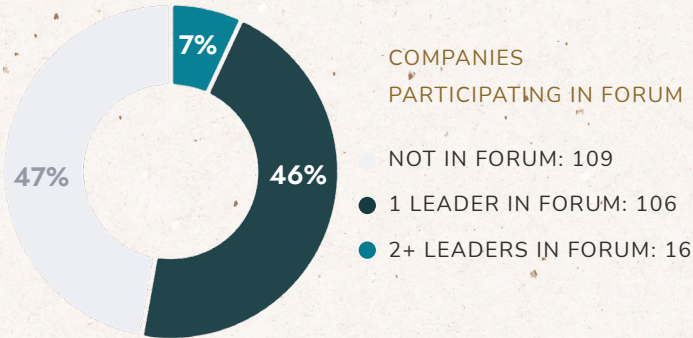
We see members making **bolder decisions**, building **stronger teams**, and creating more **sustainable growth** because they have a trusted circle of peers who understand their unique challenges as business owners.

“Our expansion into Asheville and Wilmington markets reflects the growing demand for this type of authentic peer learning,” said Lela Ray, Associate Executive Director at the Center for Private Business. “As we build new forums across North Carolina, we’re creating a statewide network of business leaders who can learn from each other’s experiences and accelerate their company’s growth while maintaining the intimate, confidential environment that makes Forum so powerful.”



Forum is Growing in Wilmington & Asheville

Our team is building out Wilmington and Asheville Forum Groups for Fiscal Year 2026. Interested? Reach out to Lela Ray, rayl@wfu.edu or go to www.cpb.wfu.edu/programming/forum to learn more or to nominate a leader.



22 TOTAL FORUM GROUPS

+2 FORUM GROUPS LAUNCHED IN FY 2025

158 TOTAL FORUM MEMBERS

+18 NEW FORUM MEMBERS ADDED IN FY 2025

122 COMPANIES PARTICIPATING IN FORUM

53% of All Companies!

16 MEMBER COMPANIES WITH 2+ LEADERS IN A FORUM

Those Member Companies Include:

Carswell Distributing, EOS Worldwide, Feetures, Hodge & Kittrell, JC Steele, Kaplan Early Learning Co., Patterson Pizza dba Dominoes, Queen City Homestore, Scott Insurance, STITCH, Thermaco, TradeMark Properties, Tradewinds, WFU Center for Private Business, Workplace Strategies, Wysong Manufacturing



Watch a deep dive into Forum





A Place to Gather at 500 West 5th Street Winston-Salem, NC

Browse Room Specifics

»» cpb.wfu.edu/the-center/our-space/500-w-5th



Scan to see
room specifics!

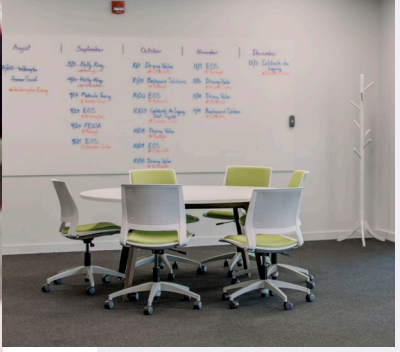
“Meetings hosted at the Center allow for more creativity, more energy and more open-mindedness. Everyone can benefit from a change of scenery to approach problems with a fresh perspective.”



Five bookable office spaces are provided as a membership benefit at no additional cost. Member companies may utilize conference and event spaces for off-site team meetings, lunch and learns, workshops and Forum meetings.

Request a Booking in Our Member Portal

»» cpb.memberclicks.net



“The Center for Private Business has been an invaluable resource for both our company and me personally. The events are consistently relevant and insightful, offering practical support for running a family-owned business.

Among the many offerings, the Forum program has been especially impactful. It provides a confidential space to share and explore both professional and personal challenges with peers who truly understand the unique dynamics of private business. The sense of community and shared experience has been incredibly meaningful.”



Bose Bratton, President
WAKE STONE PROPERTY COMPANY



**MEMBER EVENTS
HOSTED ONSITE**
June 2024 - June 2025

423

Total Member Attendees
5,388 ▲ up 43% from 2024!



**FORUM MEETINGS
HOSTED ONSITE**
June 2024 - June 2025

36

Total Forum Attendees
276



**OUTSIDE & SPONSOR
GROUPS HOSTED**
June 2024 - June 2025

62

Total Outside Attendees
396

Smart Moves to Increase the Valuation of Your Business

with Tommy Battle, Founder of Battle Business & Leadership Coaching, who led 5 “Driving Value in Your Business” workshops for our Members

One of the most common drains on a business's valuation comes from predictable traps owners fall into as they scale. These traps include over-reliance on the owner and weak financial literacy across the leadership team. Anything that makes future growth uncertain will weaken your valuation.”

So buyers are looking for accountability and structure in every layer of a company?

Tommy: “Exactly. Buyers pay more for a business with strong systems, recurring revenue, and a leadership team that understands the numbers and can run the company without the owner. They will discount heavily when those pieces aren't in place.”

You mention predictable traps you see owners falling into when scaling. Can you speak to those pitfalls?

Tommy: “Trying to improve with “one big move” is a trap. Instead, build momentum through small, disciplined improvements. A straightforward example of this is relying too heavily on annual reviews. I'm a fan of real-time coaching and scoreboards because otherwise performance drifts. Scaling without clarity creates fragility instead of strength.”

Are there visual hallmarks for success that are easy to notice but most people overlook?

Tommy: “When you walk into a company and see employees engaged, not constantly running to the owner for direction, that's a telltale marker of health. Small, consistent signs of organization add measurable value to a business' valuation.”

What's an easy win to implement?



FROM THE
“DRIVING
VALUE IN YOUR
BUSINESS”
WORKSHOP IN
WILMINGTON, NC

Tommy: “One thing all owners could do tomorrow to increase their valuation is to document a process thoroughly. Buyers place a premium on a business with systems, not just an owner's memory or presence. Capture how new leads are handled, how jobs are scheduled, or how customer issues are resolved.

That simple step reduces owner dependency and increases transferability. This is how you grow your worth as a company!”

Do you find owners to be too heads-down at times working on day-to-day problems?

Tommy: “Easily, the daily grind leaves little time for long-term strategy. The key is to build intentional rhythms that pull you out of the weeds—short, structured sessions to work on the business instead of just in it.”

How can leaders find the time?

Tommy: “Members of the Center have a massive advantage over other companies because they have resources and workshops framed around sustainability and long-term strategy. But it takes intentionality to stay ahead-of-the-curve. You will always be pulled in a myriad of directions. Stay proactive about the health of your company by staying engaged with bettering yourself.”

Building Better Business Spotlight

Hank Miller, CEO
M&N CONSTRUCTION
SUPPLY, INC.



Kevin Hicks,
Wilmington Market
Manager for The
Center for Private
Business, sat
down with Hank
Miller, CEO of
M&N Construction
Supply, Inc. in
Wilmington to talk
about mentorship,
succession and
growing as a leader.



Kevin: If you could offer one piece of advice to leaders on the upswing of their careers in their mid 30s-40s what would it be?

Hank: “Seek mentors, sponsors, and role models. It's crucial. They can provide invaluable guidance and networks that significantly impact your career.”

Kevin: Mentorship is invaluable for both parties involved. Have you learned anything while mentoring?

Hank: “The immense value of active listening and empathy. By understanding my mentees' challenges and goals it adds to my perspective as an executive. Plus seeing others succeed and knowing I was a part of their journey is vastly rewarding.”

Kevin: Older generations can forget how to learn from younger leaders.

Hank: “Yes, and one way the next generation of leaders positively differs from older generations is their use of collaboration and inclusivity. They are likely to seek diverse viewpoints and embrace technology as a tool for improvement.”

Kevin: I know you have worked with The Center for Private Business to develop a succession plan for M&N. When do you think it's the right time for other companies to begin theirs?

Hank: “A detailed succession plan for M&N was a huge priority for our team to ensure the long-term sustainability and growth of the organization. The right time to begin succession planning is well before any transition is imminent. Ideally, when the organization is prosperous. This allows for strategic development rather than reactive measures. Plus a clear plan is crucial to navigating leadership transitions smoothly.”

Kevin: Do you have a strategy for navigating leadership transitions?

Hank: “I emphasize transparency, open communication, and inclusive decision-making. This approach helps my team feel supported throughout the change process. We encourage feedback to address concerns and maintain proactive continuity.”

Kevin: Who do you turn to for feedback?

Hank: “I've been in a peer-led group for 20 years and it has been a game-changer for me. I know the Center for Private Business hosts Forum groups and I would encourage any aspiring top leader to apply. Sitting around the table with peers from diverse backgrounds and experiences, sharing challenges and successes, I've gained insights I couldn't find anywhere else. It has taught me the power of listening before acting, valuing different perspectives, and holding myself accountable.”



Center Sponsors Funding Our Progress Across NC

The Center is largely funded by corporate Sponsors whose donations fund operations.

Sponsors enable the Center to provide quality programming at a low cost, making resources available to businesses of all size, age and industry in the Carolinas.

“At PNC, we are a main street bank with national capabilities. Our sponsorship of the Wake Forest Center for Private Business is an example of how we invest in and support the communities where we live and work. We have been in business for 160 years and look forward to helping clients achieve their goals.”



Ben Pysch, Market Executive of Corporate Banking
PNC BANK

“Family Enterprise USA’s sponsorship of the Wake Forest Center for Private Business is one example of our investment in local communities, with a special focus on promoting family businesses and the successful families behind them. We care about creation, viability, sustainability, and advocating for family businesses and their lifetime of work and savings.”



John Gugliada, Director of Engagement
FAMILY ENTERPRISE USA

*Join 30+ corporate sponsors
in supporting the Center
for Private Business!*

Level 1 Sponsor \$3,000+ / year

1

- ✓ A Spot in Forum Within Parameters of Program
- ✓ Share Events in Newsletter 1x Per Month
- ✓ Submit Proposal for Workshops
- ✓ Listed in Forum Retreat Resource Directory
- ✓ Company Logo Displayed on Newsletters
- ✓ 2x a Year Free Access to Meeting Space

Level 2 Sponsor \$10,000+ / year

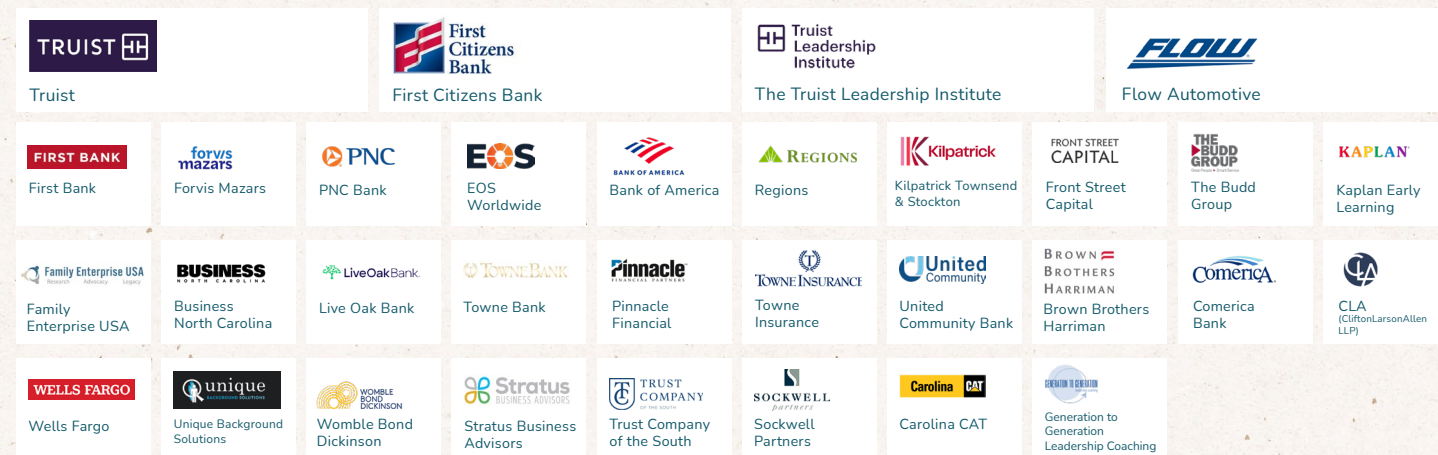
2

- ✓ All of the Benefits of \$3k Plus
- ✓ 1 Seat on 1 Market Executive Committee
- ✓ Guaranteed Program Facilitation 1x Per Year
- ✓ Dedicated Table at Legacy Speaker Events
- ✓ Verbal Recognition at All Center Events
- ✓ Unlimited Free Access to Meeting Space

Level 3 Sponsor \$20,000+ / year

3

- ✓ All of the Benefits of \$3k Plus
- ✓ All of the Benefits of \$10k Plus
- ✓ 1 Seat on All Market Executive Committees
- ✓ Serve as Subject Matter Expert for Events
- ✓ Access to Center Facilitation to Implement Forum Principles Internally
- ✓ Annual Goal Setting Meeting with the Director for Custom Designed Opportunities



Thank you to the following friends of the Center!

Don & Robbin Flow, Ragan & Dara Folan, Drew & Kelley Hancock, Stan & Liz Kelly, Kelly King, Randall & Claire Tuttle, Ed Weisiger, Chris Jones



The Center Team & Advisors

SUPPORTED BY WAKE FOREST SCHOOL OF BUSINESS



Dana Alligood
Executive Director



Lela Ray
Associate Executive Director



Heather Leach
Associate Director



Anna Ball Hodge
Triangle Market Leader



Courtney Johnson
Charlotte Market Leader



Scott Fowler
Asheville & Western NC Market Leader



Kevin Hicks
Wilmington & Eastern NC Market Leader



Stan Kelly
Advisory Board, Board Chair



Drew Hancock
Advisory Board, Vice Chair



Ragan Folan
Advisory Board Member



Julia Jackson-Newsom
Advisory Board Member



Lily Cochrane
Advisory Board Member



Annette Ranft
Advisory Board Member

Our Team's Core Values

WE ARE

CURIOUS LEADERS

"A leader who stops learning starts guessing. A leader who prioritizes learning has a growth mindset, and says, 'I don't know... yet,' and finds out." **Kevin Hicks**

OUR TEAM IS

SUPPORTIVE

"Vulnerability creates trust. When team members are willing to share challenges, it opens the door for authentic collaboration. That transparency often leads to stronger solutions, deeper relationships, and a healthier workplace culture." **Scott Fowler**

WE ACT AS

CONNECTORS

"It's no surprise that oftentimes in business, 'it's not what you know, but who you know.' Getting to that point in your career can feel like an uphill battle, and at the Center we intentionally curate an environment in which Members are able to make organic connections." **Lela Ray**

WE ARE

GO-GIVERS

"Passion for what you are doing is what drives you, especially when the going gets tough. It's what undergirds your purpose. The 'why' to the 'how and what.'" **Anna Ball Hodge**

WE STRIVE FOR

EXCELLENCE

"Excellence is where high standards meet iteration, where listening drives improvement. For the Center, that means preparing well, tailoring the room to the owners in it, and following through quickly." **Dana Alligood**

Winston-Salem & Triad Executive Committee

Amy Sparks, Vice President, Unique Background Solutions
Coleman Team, Partner, Front Street Capital
Jordan Daniel, Director of Assurance, Forvis Mazars
Fletcher Wilson, President, Wilson Insurance Services
Scott Rempe, Founder, Scooter Ink Illustration
Susanne Hall, Executive Vice President, Wysong Services
Jason Clubb, EOS Implementer, EOS Worldwide
Claire Calvin, Owner, The Porch & East of Texas

Charlotte Executive Committee

Jeff Lenhart, Partner, Forvis Mazars
Derrick Davis, Co-Founder, Informatic Concepts
Brandon Allain, Associate, Barry, Evans, Josephs & Snipes
Nick Whitney, EOS Implementer, EOS Worldwide
Catherine Johnson, Director, Sockwell Partners
Benjamin Pysch, Market Executive, PNC Bank
Carolina Ko, SVP, Bank of America
Coulter Warlick, Manager, Truist

Raleigh & the Triangle Executive Committee

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Hank Miller, CEO, M&N Construction Supply
Mike Queen, Wake Forest University Trustee
John Gardner, Market President, Truist



"Charlotte Summer Social"



"4 Generations of Dressing N.C. with Kannon's Clothing"

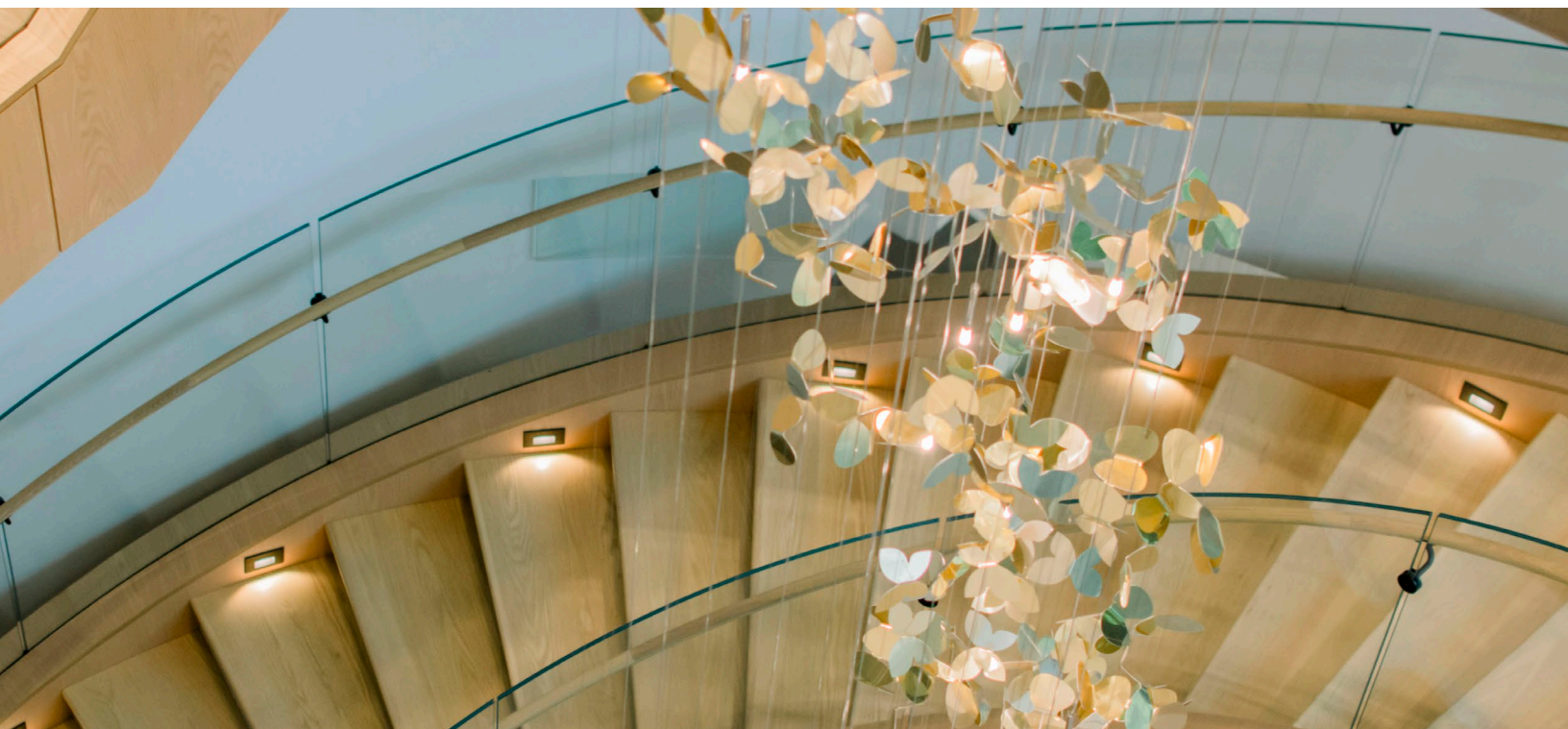


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Sabrina Presnell Rockoff, Managing Partner, McGuire, Wood & Bissette
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Rollin Groseclose, Partner, DMJPS
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