

Berks



Family Business Alliance

SUBJECT MATTER EXPERTS 2021

We have a full range of experts in all disciplines to **ASSIST** you with those **ISSUES** that are **CRITICAL TO YOUR BUSINESS SUCCESS**. These professionals offer 45 minute one-on-one consultations at your office or their location.

Thanks to our fantastic SPONSORS

we are able to offer these valuable resources at a modest cost.

FOUNDING PARTNERS & MAJOR SPONSORS:

BB&T,
FORCE pkg,
Kozloff Stoudt Attorneys,
RKL, LLP

PROGRAM SPONSORS:

Fraser Advanced
Information Systems,
Mosteller & Associates

SIGNATURE PROGRAM SPONSOR:

Stevens & Lee/Griffin

FAMILY CHAMPION SPONSORS:

Dolan Construction,
Orrstown Bank,
Paul W. Essig,
Redner's Markets,

BUSINESS VALUATION SUCCESSION PLANNING

Paula Barrett,
CPA/ABV,CVA, CEPA
Partner, Business Consulting
Services Group
RKL

Edward C. Renenger, Esq.
ESOPs
Stevens & Lee/Griffin

Jay R. Wagner, Esq.
Business Transition &
Estate Planning
Stevens & Lee/Griffin

COMMERCIAL INSURANCE

Matt Jabbour
Business Insurance Agent
BB&T Insurance Services

EMPLOYEE BENEFITS

James B. Longacre, Esq.
Executive Compensation
and Benefits
Stevens & Lee

EXECUTIVE SEARCH

Chester Q. Mosteller
Founder & President
Mosteller & Associates

FINANCIAL MANAGEMENT

Gretchen Naso,
CVA, MBA
Practice Leader, Business
Consulting Services Group
RKL

FINANCING

Mark Hornberger
Business Service Officer
BB&T

Barbara Pattison
Business Service Officer
BB&T

HUMAN RESOURCE CONSULTING, OUTSOURCING, COMPENSATION & BENEFITS

Laurel Cline,
Senior Associate
Mosteller & Associates

Lori Gliva,
SPHR, SHRM-SCP
Senior Associate
Mosteller & Associates

Scott Smith, SHRM-SCP
Senior Associate
Mosteller & Associates

INVESTMENT MANAGEMENT

Evan Hand
BB&T Investment Advisors

LEGAL PROFESSIONALS

George Balchunas, Esq.
Shareholder & Director,
Business & Banking
Kozloff Stoudt Attorneys

Dan Becker, Esq.
Shareholder & Managing
Director, Small Business
Kozloff Stoudt Attorneys

Brian Boland, Esq.
Shareholder & Director,
Estate Planning
Kozloff Stoudt Attorneys

Jeffrey R. Elliott, Esq.
Employment/HR Issues
Kozloff Stoudt Attorneys

Andrew George, Esq.
Shareholder, Estate Planning
Kozloff Stoudt Attorneys

Peter Schuchman, Esq.
Shareholder & Director,
Litigation
Kozloff Stoudt Attorneys

Charles Shurr, Esq.
Shareholder, Banking
Kozloff Stoudt Attorneys

MARKETING & DESIGN STRATEGY

Tom Newmaster
Partner
FORCE pkg.

MERGERS & ACQUISITIONS

John A. Harenza, Esq.
Corporate/M&A
Stevens & Lee/Griffin

Brian Dettmann
Investment Banking
Managing Director
BB&T

Ryan P. Hurst, ASA
Partner & Transaction
Advisory Services Practice
Leader Business Consulting
Services Group,
RKL

OPERATIONAL CONSULTING

Robert Pozesky,
Practice Leader, Business
Consulting Services Group
RKL

PACKAGING & BRAND DEVELOPMENT

Brian Harper
Partner
FORCE pkg.

RETIREMENT PLANNING, LIFE INSURANCE & FINANCIAL PLANNING

Mike Bucklin
Private Wealth Advisor
BB&T

TAX SERVICES

**Richard M.
Botwright, Esq.**
State and Local Tax
Stevens & Lee/Griffin

**Michael R. DePaul,
Jr. Esq.**
Partner, Tax Services Group
RKL

WEALTH MANAGEMENT

**William Onorato,
JD, MBA**
Senior Wealth Strategist
RKL Wealth Management

**Laurie M/ Peer,
CPA, CFP**
Partner & President,
RKL Wealth Management

For more information on
the Berks Family Business Alliance,
Visit www.GreaterReading.org
or call 610-898-7775