



**Be Our Guest** at a Mallard Advisory Group Board Meeting

Bring your best ideas, most exciting projects and toughest issues.

**Take our input and run with it.**

**Schedule a Follow-up Meeting to Further Your Progress**

or

**Engage the Group Member or Members whose skill sets, and expertise that best matches your current endeavor and future planning.**

**Projects that we've assisted on:**

- Securing Expansion, Growth or Acquisition Financing
  - Generational Leadership Development
  - Insider Transfer or Third-Party Sale Planning
    - Business Restructuring
- Family Business Transition and Successor Development
  - Key Person Compensation Planning
  - Building and Preserving Company Value
    - Detail for Retail to a Third Party



*·Engaging Strategies ·Unbiased Perspective ·Focused Accountability*

## Meet our Members

### Seasoned Professionals with Proven Success

Nearly 200 years of combined business leadership and professional expertise

#### **Michael Brummer**

##### **Michael Brummer & Associates**

Extensive senior leadership experience in international trade, policy, restructuring, and business development, strategic planning and operations, particularly in manufacturing, distribution and transportation.

#### **Jeff Liebel**

##### **Managing Partner, Counterpoint Consulting**

Specializes in assisting family and closely held companies navigate growth and transition challenges and is adept at helping leadership teams build solid, consistent organizational performance.

#### **Gary Stone**

##### **Stone & Associates**

Focused on helping business owners run more valuable, profitable and enjoyable businesses. With an emphasis on strategic performance management, we help you discover the unexploited potential that lies with your business by creating new profit and growth opportunities, increasing productivity and reducing costs.

#### **Thomas Waring**

##### **GCW Capital Group, LLC.**

##### **Family and Business Directions, LLC.**

Provides holistic business and personal financial strategies including succession planning, estate analysis, insurance planning, selective key employee/employer benefits and charitable giving.

#### **Steve Baldo**

##### **CORE Strategic Business Solutions**

High Performance Business Coach and Certified Business Transitions Advisor, with over 30 years of Executive experience in business management and development, capitalization and finance, mergers and acquisitions, leadership development, employee engagement through Consistent, Original, Repeatable, Execution (C.O.R.E.) business strategies.

Put us to work for you, as your business's Alternative Board or one on one in our individual areas of expertise.

We can work with you as needed, on a project bases or on an ongoing engagement. Our goal is help you with your most pressing issue, then get out of your way and let you run your business.