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Waldo County Small Business Conference



in partnership with



Belfast

May 11, 2022

7:30 am - 2:00 pm

UMaine Hutchinson Center

80 Belmont Ave.

Belfast, Maine 04915



Waldo County 2022 Small Business Conference

SCHEDULE

<u>Time</u>	<u>Description</u>	<u>Room</u>
7:30 am	Registration and Continental Breakfast	Atrium
8:00 - 8:50 am	Introduction & Keynote Speaker <i>Henry Beck</i> <i>Maine State Treasurer</i>	Auditorium
9:00 - 9:50 am	Breakout Session 1 A Human Resources, Hiring, Retention, Best Practices for Small Businesses <i>Presenter: Chris Nickerson,</i> <i>CEO, Whales Tooth Ventures</i>	Auditorium
9:00 - 9:50 am	Breakout Session 1 B Financial Best Practices & Why You Need a Business Plan <i>Presenter: Larry LaPlante,</i> <i>SCORE Certified Mentor</i>	Conference Room
10:00 - 10:50 am	Session 2 Hospitality Opportunities & Insights <i>Presenter: Matt Lewis,</i> <i>HospitalityMaine</i>	Auditorium

PANEL SPEAKERS

Rebecca Sargent, Esq., CTFA

Prior to establishing her own law practice in estate planning, probate, and real estate, Rebecca was Senior Vice President & Senior Trust Officer at Union Trust Company (now Camden National Bank) from 1994 to 2008. Before that, she practiced law at Loughlin & Wade in Portsmouth, NH. She merged her business with the practices of Jeffrey Jones and Roberta Kuriloff in 2013, thus forming Jones, Kuriloff & Sargent, LLC.

Rebecca holds a B.S. degree in Business Administration from The Pennsylvania State University and a J.D. degree from the University of Maine School of Law. She is admitted to the bar in Maine and New Hampshire. She is a member of the Maine, New Hampshire, and American Bar Associations as well as the Hancock County Bar Association. Rebecca graduated with honors from the National Graduate Trust School at Northwestern University and ABA Stonier Graduate School of Executive Bank Management at Georgetown University. She served as a member of the Advisory Board for the Certified Trust and Financial Advisor Program (CTFA), the Certified Council of the Institute of Certified Bankers, through 2016.

Rebecca believes in giving back to her community, so she regularly volunteers her time for local organizations. Current commitments include roles as: Corporator for Northern Light; Director for Frenchman Bay Conservancy; Board Member of the James Russell Wiggins Down East Family YMCA; former Board Member of the Ellsworth Area Chamber of Commerce; and citizen representative to the Study Committee for the Hancock County Technical Center. In addition, Rebecca has been an instructor in various estate planning and investment topics for local organizations.

An Ellsworth native, Rebecca's passions include gardening and golfing.

Peter Nicholson, CFP, AAMS, EVP, Chief Fiduciary Officer

Peter joined First National Wealth Management in October of 2015. Prior to joining First National, Pete worked for Bar Harbor Trust Services, Charles Schwab Private Client Investment Advisors and Fidelity Investments. Pete is a CERTIFIED FINANCIAL PLANNER. Pete is a graduate of both Maine Maritime, earning a BS in Marine Engineering in 2001 and the University of Maine, graduating with a BS in Business Administration with a finance concentration in 2007. Pete enjoys volunteering in the community and currently resides in Bar Harbor with his wife and two daughters.

Nicholas Walton, CFA, VP, Portfolio Manager

Nick joined First National Wealth Management in 2020. Nick worked in Boston for the last twenty years, and with MFS Investment Management since 2006. Nick earned a Bachelor of Science degree in Finance at Bentley University and is a holder of the right to use the Chartered Financial Analyst designation®. Nick lives in Bar Harbor with his wife, enjoys volunteering in the community, and spending time in Acadia National Park.

GUEST SPEAKERS

Henry Beck

In 2018, Henry Beck was elected by a Joint Convention of the 129th Maine Legislature to the Office of State Treasurer. Treasurer Beck's priorities include prudent cash pool management, protecting the earned benefits of Maine public workers and educators, and completing bond sales and public-private partnerships for the common good of all Maine people.

Treasurer Beck's government service began when he was elected to represent his neighborhood on the Waterville City Council in 2005. In 2008, he was elected to the Maine House of Representatives representing parts of Waterville and Oakland during his senior year at Colby College. In the Legislature Beck authored nearly one dozen bipartisan bills that became law on issues from pharmacy audits to infant heart screening to Maine's overdose medicine act. Beck was appointed House Chair of Joint Standing Committee on Insurance and Financial Services and to serve on the 2011 Commission to Apportion Maine's Congressional Districts.

Beck attended the University of Maine School of Law and graduated on time while serving in the Legislature. As an attorney in private practice, Beck represented Mainers and businesses involved in complex business disputes, serious criminal charges, insurance matters, and tax litigation. In 2018, Beck successfully argued an appeal before the Maine Supreme Judicial Court. Beck also holds a Certificate of Graduate Study from the Muskie School of Public Service.

Treasurer Beck's family came to central Maine nearly one hundred years ago and started a roofing company that is still operating. He is not the first Treasurer with Waterville roots, serving after Treasurers Sam Shapiro, David G. Lemoine, and Bruce L. Poliquin. Treasurer Beck is a George J. Mitchell Scholar and serves as an adviser to the American Legion Dirigo Boys State program.

Brian D. Hanson

Brian D. Hanson is President and owner of Maine Business Brokers. He has 17 years of entrepreneurial experience and purchased the company in 2010. Brian joined Maine Business Brokers after opening and operating numerous businesses in Maine and New Hampshire as well as in Novosibirsk, Russia. Some of his businesses include restaurants, nightclubs, wholesale seafood, web businesses and sporting goods stores. Brian's businesses have been featured in local print, TV and radio as well as Time Magazine and Good Morning America.

Brian was born and raised in northern Maine. Combined with his broad range of business experiences this gives him a unique understanding of Maine's small business owners and buyers. Brian graduated Magna Cum Laude from the University of Maine's School of Business and is currently working on his M.B.A in Finance from the University of Southern Maine.

GUEST SPEAKERS

Larry LaPlante

Mr. LaPlante, a retired Certified Public Accountant, started his career in public accounting providing income tax and accounting services to many small business clients. For over 20 years, he was the Controller and later Chief Financial Officer for an investor-owned electric public utility. He was responsible for investor relations, financial reporting, filings with the Securities and Exchange Commission, filings with the Federal Energy Regulatory Commission and the Maine Public Utilities Commission, as well as debt and common stock offerings. Prior to his retirement, Mr. LaPlante was the director of finance for a college in the Maine Community College System. In addition, as an adjunct faculty member, he has taught numerous accounting and financial management courses for Husson University. He has also served as a board member and officer for numerous community service groups and healthcare organizations. In 2017, he became a certified mentor for SCORE.

Matt Lewis

Matt Lewis is president and CEO of HospitalityMaine, the state's only non-profit trade group representing hotels and restaurants. Since taking the post in February 2021, he has traveled extensively across the state building relationships with hospitality stakeholders. Matt is a strong advocate for Hospitality and Tourism. Matt works to promote a message that the Hospitality industry is a wonderful career option for Mainers and their families, at all stages of their careers.

Matt relocated to Maine, after 30 years in California. He is the former Executive Director of Visit Richmond CA and ran global sales for Nikko Hotels in San Francisco. His years of experience in International hotels combined with a focus on business travel have guided his approach to hospitality leadership.

Matt is greatly enjoying Maine and is an avid traveler, having visited 70 countries. Matt is honored to lead HospitalityMaine and thanks the hard working staff and Board of Directors for their dedication.

Many thanks to our event host:



GUEST SPEAKERS

Chris W. Nickerson

Chris is the CEO of Whales Tooth Ventures, a restaurant, hospitality and boat chartering holding company based in Lincolnville, Maine. Chris, and his wife and business partner Martha, moved to Maine from Connecticut in 2021. They own the Whale's Tooth Pub in Lincolnville, as well as the Northport Inn & Lodge in Belfast - a property whose mission is to offer affordable, extended stay housing to working professionals.

Prior to the current business ventures, Chris spent 30 years in Corporate America, holding executive committee- level roles as Chief Human Resources Officer (CHRO) for BlueVoyant, a global cyber security company, as well as CHRO for TriMark, the country's largest commercial restaurant design-build company. Prior to these roles, Chris was a global Human Resources leader for blue chip companies IBM, Merck, PwC and American Express.

Earlier career experience includes ten years in management consulting where Chris analyzed companies and their leadership on behalf of venture capital and private equity firms. Chris has managed global teams of up to 160 members, and has spent time in countries such as Israel, England, Spain, Netherlands, Russia, Singapore, China and Japan. Over the course of his career, Chris has focused most of his time on talent management, any organization's most critical asset.

Chris holds a Bachelor's in Finance, Banking and Economics, a Master's in Business and has completed select post graduate studies in Organizational Development.

Chris and Martha have six children, and in parallel to their business ventures and local chamber & business group activities, enjoy boating and hiking.

Kerry Payne Stailey, SCORE Certified Mentor

Kerry offers experience and expertise in several industries, from coaching, to program management, to art, and agriculture. She spent two decades building a global consultancy advising CPA firms in the development, delivery and implementation support of value-added services, marketing programs and SME consulting systems. She worked with the Australian Government as an advisor to small business; and in addition to building her own successful studio, workshop and art practice, she has advised some of the most recognized photography names, schools and agencies in the USA.

In 2018 she established a 300 tree cherry orchard in midcoast Maine and is currently building an agritourism destination, along with a large range of value added products featuring her farm's cherries and cherry blossoms. Kerry is an experienced marketer and presenter who has produced and delivered seminars and workshops to business advisors and their teams across Australia, New Zealand, the USA, Canada and the United Kingdom.

As a SCORE Mentor she loves helping business owners and entrepreneurs build a better business and enjoy a better life.

<u>Time</u>	<u>Description</u>	<u>Room</u>
11:00 - 11:50 am	Breakout Session 3 A Marketing: Best Practices for Using Social Media, Website, Email, and More <i>Presenter: Kerry Payne Stailey, SCORE Certified Mentor</i>	Auditorium
11:00 - 11:50 am	Breakout Session 3 B Selling Your Business: Best Practices for Preparing, Planning and Selling (c) <i>Presenter: Brian Hanson, President, Maine Business Brokers, SCORE Specialist</i>	Conference Room
12:00 - 1:00 pm	Lunch Panel Discussion Retirement Planning <i>Panelists: Rebecca Sargent, Esq. CTFA Jones, Kuriloff & Sargent, LLC Peter Nicholson, CFP, AAMS, EVP, CFO Nick Walton, CFA, VP First National Wealth Management</i>	Conference Room
1:00 - 2:00 pm	Wrap up and Q&A	

Thank you for attending today's conference. Please scan the QR code to take our brief survey about the event.

