

GREATER NEW HAVEN TRUSTED ADVISORS GROUP MISSION STATEMENT

The Greater New Haven Trusted Advisors Group consists of members of the Greater New Haven Chamber of Commerce, who meet regularly to share knowledge, relationships and ideas.

As a group, we are experienced business professionals who possess an in-depth understanding of personal, business and community issues and objectives.

Acting as a professional resource council, we are committed to share our expertise in a wide range of business disciplines to support the Greater New Haven Chamber and guide member businesses and organizations on their path to success.

Wilder Baker

Principal, GPS for Management

Wilder is a management consultant focusing on marketing and marketing communications. He guides his clients to new growth through disciplined and strategic marketing planning and the development of targeted, tested messages. His clients include self-employed professionals, entrepreneurs and leaders of small to mid-sized companies in a variety of fields: sales training and development, energy conservation, online marketing and tool manufacturing. He also offers programs in writing skills and branding/positioning.



Wilder enjoyed a long and successful career in advertising with Ogilvy and other well-known agencies before running his own shop, Warwick, Baker, O'Neill in New York. Among his clients, were Maxwell House, Heineken, Nashua, Panasonic, Stop and Shop and Ingersoll Rand as well as several major trade associations including the US Tennis Association. A former Chairman of the American Advertising Federation, Wilder has also served as Adjunct Professor of Integrated Marketing Communications at the Business and Technology School of FIT in New York.

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David S. Blitz

Farmington Savings Bank



Dave has over 26 years of banking experience most of which has been in the Commercial Banking realm inclusive of several years of Asset Based Lending experience. He is Senior Commercial Lender for Farmington Savings Bank. His team is responsible for developing and maintaining loan and deposit relationships with middle market companies in Connecticut. He has structured numerous transactions to provide funding to companies for such needs as working capital, letters of credit, equipment purchase acquisitions, real estate purchase, etc. Financing transactions have typically ranged up to \$40 million.

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Bruce G. Clinton

BusinessWise, LLC / ASearch, LLC

Bruce G. Clinton is the founder of BusinessWise, LLC, an executive coaching and consulting firm, which specializes in helping entrepreneurial organizations solve strategic problems associated with growth and transition and co-founder of ASearch, LLC a retained executive search firm which uses a unique organizational development approach to remove the risk from hiring key executive talent.



In his early years as an entrepreneur, he was president and founder of a multi-office real estate firm and general partner of Heatherwood Associates.

Bruce is a graduate of Hobart College with a dual major of Economics and Psychology. He has a MBA from the University of New Haven, RCC (Registered Corporate Coach) & Registered Business Coach (RBC) designations and is a Life Member of World Association Business Coaches (WABC). He and his wife, Susan, have five children and four grandsons.

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Keith R. Dee

Managing Director, Osage Capital Partners, LLC

Keith Dee specializes in advising companies on mergers, acquisitions and divestitures, corporate finance, strategic and business advisory services. His firm provides Business and financial advisory services to emerging and middle market companies. He brings over 25 years of experience as an entrepreneur and as a corporate executive to the firm.

Keith's combination of financial and understand and appreciate the needs of president of a specialty manufacturing wellness company and founding partner to recognize the special requirements of



**Osage Capital
Partners**

operating experience enables him to his clients. His previous experiences as company, the chief financial officer of a of a public accounting practice enables Keith each business situation he encounters.

Keith began his career in public accounting eventually founding a CPA firm. He was President of Earmark, Inc.; a manufacturing company and served as the Chief Financial Officer of The Great American Backrub Company, a Public Specialty Retailer and Wellness Company.

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Jim Jackson

President and CEO, The Essex Group

An advisor to management, executive coach and public speaker, Jim Jackson is President and CEO of THE ESSEX GROUP, a business consultancy. He specializes in helping clients maximize their potential by sharpening their vision, strategy and goals. Jim's 40 years of diversified business experience range from a high-tech startup to serving as a Fortune 500 division general manager, giving him a rare insight into the balances that must be struck in a successful business enterprise.



He is a member of The Institute of Management Consultants, a founding member of The Corporate Coaching Center and a life member of the International Association of Coaches. Jim is author or co-author of a number of professional development programs and is a regular speaker for businesses and associations on a variety of topics. In addition, Jim serves on the boards and advisory councils of several businesses, civic and charitable organizations. He is a faculty member of the Essex Management Center, a strategy and leadership forum for senior executives from developing nations.

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Scott A. Junkin

Of Counsel, Reid and Riege, P.C.

Scott has more than 30 years of practice experience representing middle market corporations, public companies, and other businesses. His practice areas include Business Entity Formation (Corporations, LLCs, LLPs, Partnerships), Buy-Sell Agreements, Contracts (drafting, review and negotiation), Corporations and other Business Organizations, Debt and Equity Financing, Employment Agreements, Leveraged Buyouts, Limited Liability Company Operating Agreements, Mergers and Acquisitions, Private Placements, Securities and Transaction Financing. Scott practices in Reid and Riege's New Haven office.



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Russell G. Lowry, CFP® CRPC

Sagemark Consulting Private Wealth Services Group

Russ specializes in helping business owners accumulate wealth, protect the wealth they've already accumulated and transfer it in tax efficient ways that support their family values. His independent fee based financial planning and investment advisory practice is affiliated with the Sagemark Consulting Private Wealth Services Group, a member of Lincoln Financial Group.

He is a member of the Board of Directors of The Society of Financial Service Professionals, is a registered representative of Lincoln Financial Advisors, a broker/dealer and is an Investment Advisor Representative of Sagemark Consulting, a Registered Investment Advisor. He is also a Continuing Education Instructor for the Connecticut State Insurance Department, and is a Certified Financial Planner (CFP®) and Chartered Retirement Planning Counselor (CRPC).



Prior to joining Sagemark, Russ successfully

sold his technology firm to an international, publicly traded company in 1998.

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Donald J. Moore

Managing Director, HT Capital Advisors, LLC

Don Moore presently serves as Managing Director for HT Capital Advisors, LLC, a New York based Investment Banking firm. His responsibilities include the firm's private equity investments, as well as overseeing advisory assignments in small to medium size technology oriented manufacturing companies.

Don has an extensive background as an accomplished Chief Executive with proficiency in profitably growing global high technology manufacturing businesses, both public and private. He possesses expertise across multiple technology platforms in international electronic products manufacturing, fiber optic components and networks, precision optical components, complex wire and cable; and e-commerce.

As Chief Executive, he has raised start-up capital for high growth entrepreneurial organizations as well as secured the financing to breakout and take private divisions of large corporations. He has effectively identified and closed strategic acquisitions and negotiated numerous international manufacturing and marketing alliances. He has also led the turnaround of two manufacturing companies.

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Bill Nims

President, Harty Digital Solutions

For over 28 years, Harty Digital Solutions has helped companies find creative ways to market to their audience. Through analysis of data, Harty determines what is relevant to each individual recipient on your list and develops a strategy that increases your chance of drawing a response and a return.



From small businesses to Fortune 1,000 Companies, Harty's experience in data analysis and creative marketing solutions allows them to provide their clients with effective outreach strategies to do more than just create awareness. These same techniques have worked to support customer retention programs. In these difficult economic times, it is even more essential to use these targeted, 1-to-1, techniques to control costs and maximize return-on-investment.

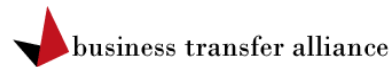
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Richard Taft

Owner, Business Transfer Alliance



Business Transfer Alliance helps Buyers (individuals, business owners making acquisitions, or investors) to find and buy small businesses. BTA conducts targeted, pro-active searches to the Buyer's specific criteria to find unadvertised opportunities. Rick also helps select business owners with exit planning.

Rick has 25 years of international business experience building strategic alliance networks involving companies of all sizes, plus many years of experience in higher education. He has developed strategic marketing, new product, and licensing initiatives in numerous industries, and his company has licensed over 150 products to various companies in 17 countries.

Rick is a Fulbright Fellow, has a Ph.D., and is a Certified Mergers & Acquisitions Advisor (CM&AA®) for lower middle market companies. He is a member of the Alliance of Mergers & Acquisitions Advisors, the Association for Corporate Growth, the Angel Investors Forum, and serves on the Board of the Greater New Haven Chamber of Commerce.

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Linda G. Wellins

Co-owner, Connecticut Computer Assistants (CCA)

CCA is a women-owned business providing software guidance and solutions. CCA provides computer consulting services and training on end-user applications, focusing on the people side of technology. Working with businesses of all sizes, CCA partners with management and IT professionals to implement solutions that meet the needs of the user.

CCA software advisors have experience with a wide range of popular business software applications in addition to several clients' proprietary applications. Each advisor has a talent for learning software of all types and an ability to share this knowledge with others.



Linda has her MBA in Information Systems and over 25 years experience working with computer technology. Her experience began in programming and expanded into hardware and software implementation and support with the introduction of desktop computers and local area networks. In 1999, CCA was formed to help businesses leverage software technology to increase efficiency.

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