

Entrepreneurship “Boot Camp”

Friday, September 18 2:00-6:00 pm

SIBL, 188 Madison Ave. at E. 34th St.

Schedule of Events

2:00—Welcome & Opening Remarks

Russell D. Rivera, CFA, President, Voice Wealth Management

2:10—“Do You Have What It Takes to Be an Entrepreneur?”

Alan Siegel, Principal, Small Business Management Consulting

2:35—“How DO You Write a Business Plan?”

Aaron Shipp, Founder & CEO, Y-Apply, Inc.

3:10—Break

3:15—Practical Considerations for Starting Your Business

Moderator: Gerard Delisle, Financial Consultant, AXA Advisors, LLC

Panelists: Ron Paltrowitz, Law Offices of Ronald I. Paltrowitz

Ann Kayman, CEO & Founder, New York Grants Company

4:00—Break

4:10—Breakout Sessions

Session 1: Getting the Word Out, Room 18

Moderator: Evan Horowitz, Founder, Evan Horowitz Advising

Panelists: Vik Rajan, co-Founder, phoneBlogger.net

Charlie Conard, Social Go To

Session 2: Sales and Marketing Are Not the Same, Room 14/15

Moderator: Dr. Bruce Hurwitz, Ph. D., President, Hurwitz Strategic Staffing

Panelists: Gordon Adelsberg, CEO, Communication for Geeks

David Fischer, President, Chartwell Seventeen Advisory Group, Inc.

5:10—Building Your Board of Advisors

Moderator: Sebastian A. Weiss, ESQ., L.L.M.,

Panelists: Matt Plociak, co-CEO, Voice of Reason Consulting

Dr. Chloe Carmichael, Ph. D., President, Carmichael Psychology

6:00—Library Closed!

Speakers & Panelists



Russell D. Rivera, CFA is President and Founder of Voice Wealth Management. Russell founded Voice Wealth Management in 2013 to help entrepreneurs, young professionals, and their families navigate their financial lives while they focus on their businesses and careers. In his role, he is a registered representative with Cambridge Investment Research and an Investment Advisor Representative with Cambridge Investment Research Advisors, Inc, member FINRA/SIPC.

He is a graduate of Harvard University with a BA in Economics. After graduating, Russell worked with Goldman Sachs Execution & Clearing as a specialist on the American Stock Exchange floor. His role there included trading and developing exchange traded funds tracking stocks, bonds, and commodities. In 2009, Russell joined APB Financial Group as its Head Trader and Market Strategist advising institutional investors on trade and ideas and macroeconomic trends.

His other interests include helping entrepreneurs flesh out their business ideas, teaching young children the basics about money and budgeting, golf, and coaching his son's t-ball team. He is also a member of several Manhattan Chamber of Commerce networks as well as co-chair of the Alpha Epsilon Pi Business & Professional Network.



Alan Siegel has an MBA in Entrepreneurship from Pace University and a Master's degree in Performing Arts Management from Brooklyn College. He has led business workshops through the Brooklyn Chamber of Commerce, the Support Center of New York, the Brooklyn Business Outreach Center and the Business Division of the Brooklyn Public Library. He is an instructor for the FastTrac Program, (part of the NYC Department of Small Business Services and the State University of New York SUNY) and an Adjunct Professor in the School of Professional Studies at New York University and the City University of New York. In addition, he is the Principal of Small Business Management Consulting - a business coaching company - and has been assisting small businesses for over 20 years by improving the way they tell their business story. His comments on marketing and branding have been featured in Crain's New York, NY Newsday, The Daily News, The New York Enterprise Report and Good Housekeeping.



Aaron A. Shipp is the Founder and CEO of Y-Apply, Inc., a nonprofit organization dedicated to helping high-achieving public school students from diverse backgrounds and their families with financial aid options and the application process to top-tier colleges and universities. Y-Apply has helped over 500 students gain admission to the best colleges and universities across the country and helped families negotiate over \$46M in financial aid to make the cost of attending such schools affordable.

In addition to his work with Y-Apply, Aaron is a leadership development and communications coach. He has worked with business professionals from Fortune 500 companies such as JPMorganChase, Ernst & Young, UBS and Goldman Sachs to enhance their executive presence and leadership skills. Aaron has also worked in the Corporate and Investment Banking division of Wachovia Securities as an organization development consultant. Before transitioning to the corporate sector, Aaron worked as a professional stage actor, working at renowned venues such as the Williamstown Theater Festival and The Shakespeare Theater of New Jersey.

Aaron is graduate of Yale University and served as a founding member of the Yale Black Alumni Association. He led its New York City chapter and served on its national Board of Directors. Aaron is also a former Vice President of the Yale Alumni Association of New York. His other board service has included a term on the board of directors for Time-Out Youth, an advocacy group for LGBTI youth. He is also an active member of Marble Collegiate Church in New York City.



Strategic and multi-disciplined Financial Consultant, **Gerald Delisle** brings his considerable skills and expertise to his Executive Benefits Planning Consultancy. Mr. Delisle works with high earning executives, CPA's, Lawyers and Doctors and crafts innovative solutions that provide these high earners their appropriate and deserved retirement income benefits in their retirement years which cannot be obtained through conventional ERISA retirement income models such as 401k's and IRA's.

On the Equity and Debt raising front, Mr. Delisle as CEO of his own firm successfully raised \$7 million in equity funding when his Risk Modeling Software firm obtained an enterprise valuation of \$20 million. Delisle also helped strategize several debt financing deals for firms in need of additional capital to sustain growth initiatives. Delisle sold his Risk Modeling Software business in 2008 to investment bankers.

Mr. Delisle is a highly accomplished turnaround consultant, financial and software executive with over 25 years of experience. He is also a Financial and Investment Advisor to Non-Profit organizations seeking his advice and counsel on finance, budgets and investments.

Gerald Delisle lives in New York City with his significant other and has 4 children.



Ann Kayman is owner, founder, and CEO of the New York Grant Company, an award winning, certified woman-owned business connecting businesses, organizations, and communities with government grants and economic incentive programs designed to spur job creation, investment, workforce development, and opportunities in New York, the Tri-State area, and more and more nationally.

Ann had been a lawyer for the past 30 years and has been an economic development professional for the past 17 years. She and her team of 20 economic development experts help navigate the maze of economic incentives to help catalyze job growth and opportunities among businesses and whole communities.

Ann is an ardent advocate of small business, M/WBE's, veterans in business, community development, and sustainability. She is widely covered in the press and speaks and writes regularly as an advocate on these topics and on the subjects of economic development, community revitalization, and environmental responsibility.

Her team of professionals works with literally hundreds of businesses and organizations to help them realize a variety of awards, working with them intensively on the process from application preparation, pre-qualification, eligibility analysis, compliance, and grants administration from beginning to end of the often complex process of obtaining and receiving incentive awards.

Ann serves on the Board of Directors of the Manhattan Chamber of Commerce. She also serves on various working committees of the City and State of New York (eg, Seaport Working Group, Veterans Working Group) and of not-for-profit organizations, and she regularly mentors entrepreneurs.

Ann was graduated magna cum laude from Barnard College in 1982 and cum laude from Case Western Reserve University School of Law in 1985.

She lives near Wall Street in Lower Manhattan, home since 1998, and in Long Beach, Long Island, where she helped to shut down the oldest and dirtiest incinerator on Long Island in 1987.

Ann is a member and sponsor of numerous community based and business organizations, such as REBNY, IFMA, European American Chamber of Commerce, Long Island City Partnership, New York Tech Council, The Black Institute, and of the Chambers of Commerce of each of the five boroughs, among others. She was on the founding Boards of the Intelligent Communities Association, Envirolution, and the Women's Leadership Exchange, among others.



Ronald I. Paltrowitz, acting as an outsourced general counsel, provides a full range of commercial transaction and litigation services to individual entrepreneurs and small and medium-sized businesses including related real estate, intellectual property, and employer-employee relationship matters. Mr. Paltrowitz also represents overseas companies seeking to establish a business presence in the United States.

For more than forty years, Mr. Paltrowitz has been engaged in the practice of law in the areas of general business and corporate law, real estate, intellectual property, and employment law, and commercial litigation, arbitration, and mediation. He has tried a large number of commercial

cases at all levels of the trial courts in New York, and in federal courts in New York, California, Michigan, Illinois, and Massachusetts. In addition, he has represented clients in a large number of arbitration proceedings as both claiming and responding parties. Mr. Paltrowitz has also served as General Counsel of several small businesses, in which positions he was responsible for handling all of the legal matters for these companies, and is currently the General Counsel of the Manhattan Chamber of Commerce. Mr. Paltrowitz is also currently serving as the Chamber's Vice-Chairman.

Mr. Paltrowitz previously served as a Faculty Member and Counselor of American Women's Economic Development (AWED), New York, New York, which offered support and training to entrepreneurial women, augmenting business theory with practical advice, and as an Adjunct Instructor at the New York University School of Continuing Education. Currently, he is a frequent presenter at the FastTrac program sponsored by the SUNY Levin Institute in partnership with the New York City Department of Small Business Services and the Kauffman FastTrac Foundation. He also has given seminars on legal issues including topics such as entity choice, contracts, and intellectual property issues.

Mr. Paltrowitz is a member of the Association of the Bar of the City of New York, where he has served on the Committee on Women in the Courts and the Committee on Books in the Law, and the Small Business Committee.

Mr. Paltrowitz was admitted to practice law in New York State and the Southern and Eastern Districts of New York in 1973. He is also admitted to practice in the Northern District of California, the Eastern District of Michigan, the Second Circuit Court of Appeals, and the Supreme Court of the United States. He was graduated from Boston University School of Law, where he received his J.D. degree cum laude in 1972, and Boston University College of Liberal Arts, where he received a Bachelor of Arts in History and Government in 1967. From June 1969 through June 1971, Mr. Paltrowitz served in the United States Army where he was assigned to the Office of the Staff Judge Advocate, 8th Infantry Division, Bad Kreuznach, West Germany.

His interests include travel, golf, sailing, gardening and wine collecting.



Bruce A. Hurwitz, Ph.D., President and CEO of Hurwitz Strategic Staffing, Ltd., has been an executive recruiter since 2003. A recognized authority on career counseling, recruitment, and employment, he has been cited in over 575 articles, appearing in more than 380 publications, across the United States and in 22 foreign countries. A volunteer with the Manhattan Chamber of Commerce, he serves as a Board Member, Co-Chair of the Entrepreneurs Network, Ambassador, and host of their weekly podcast, The Voice of Manhattan Business. Additionally, he is an on-camera talent for eHow.com whose video Good Responses to Interview Questions Regarding Weaknesses was a "2012 Top Performer." In the past he has written articles for Careerealism.com, the National Association of Sales Professionals, and is a regular contributor to his own blog, Employment Edification, as well as LinkedIn Pulse.

Prior to becoming a recruiter, Hurwitz had some fifteen years' experience in fundraising, marketing, public relations and communications. As Director of Development at Bronx-based Aging in America, he created their first Development Department, ultimately tripling annual revenue and garnering unprecedented media coverage for the agency. His marketing efforts at AIA, in conjunction with Time-Warner, were the focus of a feature article in The NonProfit Times. He was the host and producer of AIA's award-winning live half-hour call-in program on Bronxnet Television, Aging Well. He is a past Contributing Writer for the New York Nonprofit Press.

Hurwitz is an honors graduate of the Department of International Relations of the Hebrew University of Jerusalem, Israel, from where he received his doctoral degree. The author of four books and scores of peer-reviewed and journalistic publications, he is a sought after speaker who has spoken at The New York Public Library, New York City Paralegal Society, Joint Services Academy Networking Group and the New York State Department of Labor, to name but a few. His most recent books are Success! As Employee or Entrepreneur and A Hooker's Guide to Getting a Job: Parables from the Real World of Career Counseling and Executive Recruiting.



Dave Fischer is the Founder and President of Chartwell Seventeen Advisory Group Inc., a certified Sandler Training Center based in Manhattan. At its simplest; he helps his clients become more effective at selling without sounding like a "stereotypical salesperson". Equipped with over 20 years of experience in selling and leading sales organizations as well as the Sandler Selling system, Dave has partnered with solopreneurs, small businesses and Fortune 500 companies across a wide range of industries in helping them to build a high performance sales culture. Dave's experience

has only amplified his passion for helping individuals and organizations reach their professional goals and increase their revenue.

Dave is a published author holding a variety of authorship titles and awards. He is also an established public speaker, facilitating professional interactive workshops to Associations, Chapter Meetings, Chambers of Commerce, Company Development Days and Educational Institutions across New York City.

Dave holds a B.A. from the University at Albany: State University of New York as well as an MBA from Columbia Business School. He is a native New Yorker and currently resides on the Upper East Side of Manhattan.



After two decades in R&D and management consulting, **Gordon Adelsberg** joined Communication for Geeks as the CEO.

Do what you do well, do what you love. When I started my career, I was a pretty good research scientist, but I knew I needed to improve my business skills. The major breakthrough came not through the workplace, but through coaching. You want to learn to communicate? Try coaching a rowdy, rough-and-tumble water polo team. I learned – and learned quickly – how to make the seemingly complex simple and how to put things in terms that were important to each athlete.

These skills helped me make the transition from scientist, the “Geek and Proud of It!” in “Communication for Geeks,” to entrepreneur and management consultant. The most satisfying successes in my consulting career came not from my technical brilliance, but from making things crystal clear for my clients, then teaching them the good communication skills needed to share their best with their colleagues. Turns out, those skills were the most important thing I left for my clients. My mission now is to help the world's technical people develop the effective communication skills in the workplace that they need to advance their careers.



Evan Horowitz empowers people to live more awesome lives. He works with those who share his belief that even the most successful people can always achieve more and experience deeper fulfillment.

After a decade of success in business, including an MBA from Harvard and leadership roles at major brands like Samsung and Macy's, Evan followed his dream of entrepreneurship. Today, Evan's clients are ambitious business people who are looking for the smartest & fastest path to their dreams. In his independent consulting practice, and as a coach with a revolutionary human performance program, Evan enables people to rapidly grow their earnings, achieve greater personal fulfillment, and accelerate their impact on the world.



Vikram Rajan is a Co-Founder of phoneBlogger.net. Vik started Practice Marketing Advisors and its blog as he realized attorneys, CPAs, and related professionals required specialized marketing help that accounts for clients' professional code of conduct, ethics, and model rules. Vik is a columnist for AICPA's largest publication for accountants and frequently helps to present CLE classes through various Bar Associations. Vikram's book, “365 Personal Brand Marketing Thumb-Rules” published in 2008, is available through any bookstore. Vik lives in Harlem, NYC.



Charlie Conard, Principal, Social Go To

As a recognized expert on Social Media Marketing and Digital Analytics, Charlie develops strategic marketing roadmaps for his clients that generate prospects, cultivate leads, and build business through social media and other inbound marketing online.

Charlie's strategies help “connect the dots” in ways that help Social Media efforts lead to positive business outcomes.

Significant brands he's worked with including: L'Oréal, American Airlines, British Tourist Board, Mount Sinai Medical Center, NYU-Langone Medical Center, Social Gradient/Hunter College - CUNY, Kitchen Aid, Tate's Bake Shop and the United Way of New York City.

He's a Featured Speaker, Panelist & Presenter for many organizations, including:

New York Public Library Small Business Resource Center, New York State Small Business Development Center, Columbia University Medical Center, NY Independent Publishers Association, Out Professionals, Center for Nonprofit Success, and the Direct Marketing Association.



Sebastian A. Weiss, Esq., L.L.M. is an attorney and tax return preparer in private practice in New York City. His practice is concentrated in the areas of corporate law and taxation.

Mr. Weiss' corporate practice focuses on corporate and commercial contracts for domestic and international transactions, as well as corporate formation and corporate governance.

He also represents clients in connection with tax matters, such as U.S. tax return preparation, tax planning, and tax controversies, including petitions and proceedings in U.S. Tax Court.

A native French speaker, Mr. Weiss frequently advises French as well as other foreign clients in connection with U.S. tax laws, rules and regulations. His goal is to help clients evaluate business opportunities and achieve their objectives while limiting potential liability for both legal claims and any unpaid U.S. taxes.



Matt Plociak is a serial entrepreneur and author having started several companies since 1981.

His skill set includes expertise in sales and marketing, as well as financial management.

Along with Michael Gansl, he co-founded and managed Netlan through 15 years of computer services industry changes, culminating in a successful sale of the firm to a NASDAQ listed e-commerce B2B company.

Matt has over thirty years of experience in managing various small and large businesses, and is translating his extensive experience into measurable growth for small businesses in the New York City metropolitan area.

As CFO for a 240-unit Manhattan co-op, he has refinanced the buildings underlying mortgage for \$22M, which enabled the creation of a \$10M reserve fund.

In his spare time, enjoys biking, skiing, and golfing. And wine!



Dr. Chloe Carmichael holds a doctorate in Clinical Psychology from Long Island University. Her private practice focuses on stress management, relationship issues, self-esteem, and coaching. Dr. Carmichael sees clients in her Manhattan office or via Skype.

Dr. Carmichael attended Columbia University for a BA in Psychology, and graduated summa cum laude with Departmental Honors in Psychology. She completed her doctorate in Clinical Psychology at Long Island University in Brooklyn; the LIU Clinical Psychology Program admits fewer than 10% of applicants and is accredited by the American Psychological Association. Dr. Carmichael completed her clinical training at Lenox Hill Hospital and Kings County Hospital, as well as other settings such as community clinics and academic centers. Dr. Carmichael has published work on issues related to psychotherapy through academic sources such as Guilford, and presented at the Anxiety Disorders Association of America. Dr. Carmichael has instructed undergraduate courses at Long Island University and has served as adjunct faculty at the City University of New York. In addition, she has been a certified yoga instructor since 2001; she has also completed coursework in Buddhism and meditation with Robert Tenzen-Thurman (Dr. Thurman is an Oxford scholar and was the first American to be ordained a Tibetan monk by the Dalai

Lama) and Mindfulness-Based Stress Reduction designed by the Jon Kabat-Zinn of the University of Massachusetts Medical School. In addition, Dr. Carmichael was recently named as the psychologist for the New York College of Podiatric Medicine. In her role at the NYCPM, Dr. Carmichael provides support to faculty and students in the form of individual counseling as well as the creation and delivery of stress-management and goal-attainment workshops. Previously, Dr. Carmichael worked at Corporate Counseling Associates in Manhattan. CCA contracts with financial institutions, law firms, cultural institutions, and other corporations. Dr. Carmichael has also been featured on VH1, Inside Edition, and other media.

Dr. Carmichael is also an active member and co-chair of a committee for the New York Junior League, which is a charitable organization devoted to promoting volunteerism and improving the lives of women and children in New York. In addition to her work with executives and very high-functioning clientele, Dr. Carmichael has provided clinical as well as personal volunteer services to under-served populations including the homeless, veterans with addictions, and poverty-level immigrants.