

STRATEGIC ADVISORY BOARD



MICHAEL J. GELB

Co-chair Michael is the world's leading authority on the application of genius thinking to personal and organizational development. He is a pioneer in the fields of creative thinking, accelerated learning, and innovative leadership. Gelb leads seminars for organizations such as DuPont, Merck, Microsoft, Nike, Roche and YPO. He brings more than 35 years of experience as a professional speaker, seminar leader and organizational consultant to his diverse, international clientele. Michael is the author of 15 books on creativity and innovation including the international best seller *How to Think Like Leonardo Da Vinci: Seven Steps to Genius Every Day*.



JENNIFER BORISLOW, CLU

Jennifer Borislow is the Founding Principal of Borislow Insurance. She is a nationally recognized expert, author, speaker and thought leader on employee benefits, insurance and related business strategies. As Chief Executive Officer and strategic coach of the organization, Jennifer focuses her energy on helping the agency create a unique experience for our clients and doing it all with a personal touch. For 36 years, Jennifer has helped business owners, executives and professionals develop a clear, forward-looking strategic vision for their organization that leverages employee benefits, risk management and much more.

She is the co-author of four books, *Bend the Healthcare Trend*, *Inspire to Act* and *Inspire to Act for Kids* with her business partner, Mark S. Gaunya. *Inspire to Act* is a collection of stories helping others to embrace the power of kindness.

Jennifer is Past President of the Million Dollar Round Table (MDRT), a premier international, association of leading financial services professionals. She is also a leading member of prominent industry associations such as TOT, NAIFA, NAHU and AALU, as well as several carrier/broker advisory councils. She has quoted and published in *Advisor Today*, *Business Week*, *Life Insurance Selling*, *Boston Globe* and other trade journals and publications.



HEATH DIECKERT

Heath is the founder of The Dieckert Group, a coaching group that has served over 10,000 clients in over 3000 companies in 43 countries. Heath's passion is serving company founders and CEO's as they navigate the multiple stages of corporate and professional development in order to sustainably grow and impact the world in a positive way. Heath was drawn to LifeGuides because he believes its mission is an extension and expansion of his own life's work and is committed to seeing LifeGuides thrive and grow like so many of his other clients.



SYLVIA BENITO

Sylvia Benito is portfolio manager with 20 years of experience in managing family office investments. She began her career as an entrepreneur, co founding a start up in South America, The Oasis Institute, which she successfully exited before becoming a professional investor. She has worked in various capacities in wealth management, from hedge fund analyst to investment strategist for ultra high net worth individuals, managing \$1B in assets at GenSpring. Sylvia connects consciousness to capital by bridging the traditional world of investing to her proprietary innovations in quantifying the alignment, awareness, and transformative purpose of any company. Sylvia works with families, founders, and boards to adjust alignment to their highest and truest purpose, and in doing so, create chains of abundance that benefit the common good.

Sylvia holds her CFA charter and is trained in family governance and systems.



DR. CHRISTOPHER JONES

Educated at the University of Oxford with dual degrees in health economics and biology, Dr. Jones is widely recognized for his health economics and outcomes research evaluations of in-vitro fertilization (IVF) that resulted in annual financial savings up to USD 100 million to the National Health Services (NHS), without compromising women's success rates. In 1999, he invented evidence-based fertility insurance, a concept which is now being implemented internationally. He also founded the first website to give women population-based information concerning their chances of taking home a baby following IVF.

Dr. Jones has authored and co-authored scholarly articles that have appeared in such places as the New England Journal of Medicine and British Medical Journal.

He currently works in venture capital, networking with existing and future entrepreneurs in early investment opportunities in Health Tech and Cybersecurity.



JODY HOLZMAN

Jody is founder and Senior Managing Partner of Longevity Venture Advisors LLC, where he works with innovative entrepreneurs, venture investors, public companies and non-profit organizations to successfully leverage business opportunities in the \$7.6 trillion Longevity Economy. He is a recognized expert on innovation, products and services of relevance to the aging population – as well as the opportunities and challenges presented by the demographic wave. He was recently recognized as a Top 50 Influencer in Aging by Next Avenue/NPR.

Jody was previously AARP's Senior Vice President of Market Innovation where he built the first program to spark innovation in the market that benefits people over 50. In this role, he developed the concept of the \$7.6 trillion Longevity Economy. Jody launched the Longevity Network www.longevitynetwork.org with United Healthcare, a destination for entrepreneurs, investors, and industry. He also built the health-focused research consortium, Project Catalyst, including United Healthcare, Pfizer, Medstar Health and Robert Wood Johnson.

Jody holds a graduate degree from the University of Chicago. He is a Managing Director of Match Point Partners, a healthcare advisory firm and investment bank. His work has been published in Venture Capital Review, American Banker, Journal of Business Strategy, Competitive Intelligence Magazine and Competitive Intelligence Anthology. His achievements have been recognized in Bloomberg Businessweek, CNBC, Financial Times, Forbes, Fortune, Information Week, Marketplace, NY Times, PBS News Hour, VentureBeat, and other media.



SERGUEI NETESSINE

Serguei Netessine is Vice-Dean for Global Initiatives and Dhirubhai Ambani Professor of Innovation and Entrepreneurship at the Operations, Information and Decisions Department of the Wharton School, University of Pennsylvania.

Prof. Netessine received BS/MS degrees in Computer Science and Electrical Engineering from Moscow Institute of Electronic Technology. After working for Motorola and Lucent Technologies, he received MS/Ph.D. degrees in Operations Management from the University of Rochester. He has worked on business model innovation and operational excellence with

numerous government and Fortune-500 organizations including the FAA (USA), Government of Singapore, Lockheed Martin, Procter & Gamble, McDonald's, Rolls Royce, Comcast, Expedia, ABB and US Air Force.

Prof. Netessine regularly participates in forums on Innovation and Entrepreneurship, including World Economic Forum in Davos and World Knowledge Forum in Seoul. He was a member of the "Future of the Economy" committee for Singapore Government.

A prolific writer, Professor Netessine holds senior editorial positions at leading academic journals and has co-authored publications in prominent management journals, including: Management Science, Marketing Science, Operations Research, Harvard Business Review and other. His work has received extensive media coverage in CIO Magazine,

The Economist, Forbes, Huffington Post, Multichannel Merchant, New York Times, US News, Business Standard and Strategy & Business and other press.



RYAN BIFULCO

Ryan has been one of the first LifeGuides Advisors since early 2017 and has helped provide strategy and support for the founding team over the years. He's been online since 1991 and has extensive experience plus expertise with startups, leadership, digital marketing, social media, sales, partnerships, B to B distribution and PR.

Ryan has been featured on ABC Radio, Business Talk Radio and MediaPost.com. He founded and leads Travel Spike, the #1 media platform in comScore Travel reaching over 200 million travelers a month. He produced the first luxury travel podcast ever made back in 2007 before podcasting was cool. Ryan invented the first vertical online network for the travel industry called Travel Ad Network® in 2002. He launched airtran.com in 1998 and guided it to become the #1 airline website according to Salomon Smith Barney. Ryan increased revenues by 20% year over year for Airtran to over \$500 million. He was promoted three times in three years at US Air and was responsible for over \$675 million in revenue per year. He received his degree in Economics from Wake Forest University. Ryan is very involved in various charities and volunteer committees including The Leukemia & Lymphoma Society which produces an Atlanta event that raises \$2 million annually with over 10,000 walkers.



BOB WHIPPLE

Bob Whipple is CEO of Leadergrow Inc., an organization dedicated to development of leaders. He speaks internationally on leadership topics and the development of trust. A senior leader at a Fortune 500 company for over 30 years, Bob accomplished revolutionary change while leading a division of over 2000 people through the application of outstanding “people” skills.

Bob is a student of the leadership process and has developed unique approaches to achieving excellent results through full engagement of people. He is author of four books and 60 videos on Trust and Leadership.

Bob’s ability to communicate pragmatic approaches to building trust in an entertaining and motivational format has won him top ranking wherever he speaks. His work has earned him the popular title of “The TRUST Ambassador.”

Mr. Whipple holds a Bachelors Degree in Mechanical Engineering from Union College, a Masters Degree in Chemical Engineering from Syracuse University, and a Masters of Business Administration from The Simon School at The University of Rochester. He is a Management Quality “Blackbelt” and has achieved a Certified Professional in Learning and Performance (CPLP) certification from the Association for Talent Development (recertified in 2020).

Honors:

Lifetime Achievement Award for Thought Leadership in Trust – Trust Across America 2013

Lifetime Achievement Award – Association for Talent Development 2019

Chair of Board of Directors – Rochester Area Business Ethics Foundation 2017-2020

Making an Impact Award – National Association for Human Resources 2018

Best Consultant Award – Central New York American Society for Training and Development 2011



MARTIN S. KURTZ

Marty is passionate about creating productive workplaces. His work unlocks collaboration and unleashes the potential of teams to achieve breakthrough results. He is the founder of Kurtz Consulting Group, Inc., an Organization Development and Executive Coaching firm based in the United States and operating internationally.

Simplifying how clients work together, Marty has navigated complex organization structures for over 30 years. His work in creating productive environments has supported the success of brand, innovation and product development teams on local, regional and global levels.

Marty’s philosophy of work calls upon him to develop High Performing Teams that create High Performing Organizations. His applications of Executive Team Development are designed to cascade into the organization and solidify alignment of focus, results and culture.

A sample of companies Marty has supported include Johnson & Johnson, Novartis, Coach, Campbell’s, L’Oreal, Chase, UBS, Mars, Cadbury-Schweppes, Kind Snacks, Amy’s Food, Revlon, Life Technologies, Genentech, and Amgen.

Marty’s grandparents came to America as shop-owners and taught their family the value of hard work and dedication to a shared purpose. Today he lives in Northern NJ in a lakeside community not far from NYC.



BOB SPOER

Bob Spoer is Chief Entrepreneur for People at Ashoka, the world's leading network of social entrepreneurs. In 2017, Bob founded "Collaboration for Talent" as a 501c3 NGO to advance a new change maker talent engagement marketplace globally. Bob is also the founder of "Recruiting for Good" (RFG) at LinkedIn, which does pro bono executive and technical searches for NGOs and governments globally. Pro bono clients include the White House Presidential Innovation Fellows (PIF), Playworks, Global Network Initiative and Ashoka. Thanks in part to RFG's diversity recruiting success for PIF,

President Obama signed the bipartisan Talent Act making the Presidential Innovation Fellows program permanent. Recruiting for Good was recently scaled up globally by LinkedIn to help companies on the front lines of COVID recruit staff and volunteers.

A veteran of Silicon Valley search, Spoer has recruited business and technical innovators globally for a number of Silicon Valley companies. As Talent Market Strategist at LinkedIn, Bob contributed to their IP with a patent for gathering trusted referrals from extended networks, invented the "hiring manager" review feature, and initiated the "Volunteer and Causes" section on the LinkedIn Profile. Over 10M professionals signal nonprofit interests today, enabling a new way for professionals to signal interests and for NGOs to find volunteers.

Previously, Spoer ran global recruiting at Trimble and TCSI. All 6 start-ups for which Bob recruited either full or part time went IPO, including LinkedIn, Bloom Energy and TCSI. He began his search career with Spencer Stuart based in Hong Kong



GEORGE BANDARIAN II

George is the interim COO at LifeGuides responsible for managing and curating our product – the amazing guides who share their experience, empathy and authentic caring. He also oversees software development and customer onboarding, all of which are aligned to deliver on the north star of Delight – customer and employee delight.

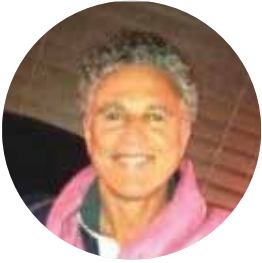
Prior, George was the President & CEO of AMI for over 15 years. As a successful CEO, he grew revenues and value over 10X turning the company into a leading provider of business process automation, with notable clients such as SpaceX, Walt Disney Company, NBC Universal, Northrop Grumman, USC, County of Los Angeles and many others. By selling workflow automation over the course of 15+ years, George gained incredibly wide and deep B2B vertical and horizontal market experience across many industries and sizes including Enterprise, SMB, Government, Education and Military. Knowing he had a greater impact to make in the world, in February 2018 he negotiated a multi-million-dollar exit selling to a strategic buyer creating huge wins for all parties involved.

George graduated from USC's Marshall School of Business, Greif Center for Entrepreneurship. He was born and raised and happily living in Glendale, California. He loves to love his wife Mariam and 2 boys Geo and Greyson. In his free time, George can be found in deep meditation, practicing yoga, playing or watching sports, or learning about the latest in exponential technologies, especially A.I. and Robotics.



MARK MCDONOUGH

Mark is CEO of Serenitee Restaurant Group, the largest restaurant group north of Boston. His personal focus is on enhancing hospitality, marketing, and building systems that measure and increase performance.



JUD IRELAND

Jud was the first cash investor into LifeGuides, after Mark seeded the enterprise for a couple years of early research and testing. He was our first Founding Angel Investor. Jud is Chairman of Wisdom Trust Capital and EDR Global, which engages over 168 Chinese TV stations in 30 cities to promote environmental education and Earth Day events. In 2009 Jud was the only American member of the Chinese Beijing Environmental Exchange allowed to invest, trade and advise Chinese companies on carbon trading.

Jud is Chairman of GummiWerks, which is developing LUVLI, an innovative next gen female condom (soon to be launched). She is also Chairman of Naked Luxury condoms. Both brands have a strong social conscience and vision.

Jud served as Chairman of the environmental organization Big Blue Foundation which pioneered “Electronic Democracy.” Founded by Mark McLaughlin and Regina Cleveland, it was known for controversial hard hitting Environmental PSA films featuring James Earl Jones asking (with success) that President Bush attend the First Earth Summit in Rio -- and with Paul Newman asking the President to “Save the National Forests” -- which President Clinton did. Big Blue was endorsed by the UN and 8 top environmental groups.



COURTNEY A. SEARD

Courtney is passionate about developing company culture, engaging teams, coaching leaders, and transforming people-related systems. Courtney has gained global experience and broad leadership expertise working with teams and leaders to take ownership, clarify and enhance their team experience, and create a clear path forward while delivering measurable results.

Throughout her 15+ years working with startups and Fortune 500 companies using the most innovative mind sciences and entrepreneurial strategies available today, the outcomes in her training and coaching methods are reflected in her clients and their track record of success.

With her niche being late series A early/ series B startup and entrepreneurs who understand the importance and impact of company culture and are consciously committed and focused on developing and improving company culture, outcomes and health. Courtney works with companies such as GE, Snap Inc., Hilton, AT&T, Unilever, WPP, The United State of Women, The Campaign School at Yale, Loeb NYC, Bonin Ventures, and Insight Partners. She is the creator of “The Rise: Vision| Action| Planner, and is a TEDX speaker and is represented by Live Nation’s SME Division.



DAVID CHEN

Mr. David Chen co-founded AngelVest Group (angelvestgroup.com), an investment platform comprising of individual angel investors to curate and invest in early-stage companies. AngelVest Group has grown to be one of the largest branded angel groups in Greater China comprised of mostly American expats based in Shanghai, Hong Kong, and Singapore. Mr. Chen is an avid supporter of disruptive innovation and entrepreneurs who have great vision and high levels of consciousness for making large-scale positive social impact. His areas of investment focus in recent years include robotics, AI, blockchain, and other Internet businesses.

Mr. Chen is also a Board member of the Harvard Business School Alumni Angels – with the mission to provide an educational and networking forum for individuals interested in angel investing. Previously, he worked in a variety of corporate finance and product development roles at companies including Salomon Brothers, Advanced Micro Devices, and Honda Motor.

Mr. Chen earned his BS in Electrical Engineering from the University of Rochester and MBA from Harvard Business School. Originally from New York, Mr. Chen recently lived in Shanghai, China for over 12 years and currently spends his time between the USA and Asia.



WILL WALLACE

With over 25 years experience in organizational development & sustainability, leadership development & coaching, employee engagement & retention, and diversity equity inclusion, Will Wallace has worked in multiple sectors and industries including projects for Fortune 100 companies including AT&T and Verizon. He has worked directly for companies including Disney, Marriott International, MAXIMUS International on the New York State's Department of Health project, and DHL Express US.

Will has also gained a well-rounded education in his field of passion, earning a Master of Science in Organizational Learning and Leadership, and a Bachelor of Science in Business Administration with a specialization in Organizational Leadership, from Barry University in Miami Shores, Florida.

Will now harnesses his experience and education to deliver human element initiatives. He creates programs that promote a company culture where all employees and customers are fully engaged and teaches them how to foster an environment where human interest, moral and ethical values, and lasting relationships can grow and prosper.



TARRA MITCHELL

Tarra Mitchell is author of the award-winning conscious leadership book *The Yoga of Leadership: A Practical Guide to Health, Happiness, and Inspiring Total Team Engagement* endorsed by John Mackey, Co-Founder and CEO, Whole Foods Market. Tarra is a certified yoga teacher with expertise in holistic wellbeing, mind/body healing, yoga, meditation, and stress management.

A conscious Capitalist with vision, Tarra advises founders of companies and investment funds who are dedicated to enriching humanity. She has a history of creating scalable technology-enabled platforms that enhance operational efficiency and improve returns. Her keen ability to connect with people allowed her to direct billion dollar fundraising events and develop relationships around the world.

Tarra is Founder of WAVE Capital Partners, a platform-focused impact fund where she co-created the investment strategy, led fund formation, and branded the Partnership. Prior to founding WAVE she was a Director at Landmark Partners, a \$28 billion private equity firm. At Landmark, Tarra created a scalable foundation for growth within the capital raising and investor relations functions, coordinated fundraisings of over \$2 billion, and initiated Landmark's entry into Asia through a joint venture in Korea. As Member of the Board of the Women's Association of Venture and Equity, a national organization dedicated to the growth of women in the field of private equity and venture capital, she created a platform for steering committees that allowed the organization to scale nationwide.



IN MEMORIAM OF BARBARA MARX HUBBARD (1929-2019),
our advisor, colleague, and friend for her tremendous help and
guidance launching LifeGuides.

Barbara was a world-respected futurist, author and public speaker. She was credited with the concepts of 'The Synergy Engine' and the 'birthing' of humanity. As an author, speaker and Co-founder/President of the Foundation for Conscious Evolution, Barbara posited that humanity now, as never before, is on the threshold of a quantum leap. If we are able to integrate newly emergent scientific, social, and spiritual capacities, we could transform ourselves to move beyond our current global crises to a magnificent future equal to our vast new potential.

She has a biography by author Neale Donald Walsch, *The Mother of Invention: The Legacy of Barbara Marx Hubbard and the Future of "YOU."* Her name was placed in nomination for the vice-presidency of the United States on the Democratic ticket in 1984, and at which convention she gave a speech upon being nominated.

Barbara will remain in the thoughts and hearts of our team.