

## Contact

[www.linkedin.com/in/scott-adkins-54b10ab](https://www.linkedin.com/in/scott-adkins-54b10ab) (LinkedIn)

## Top Skills

Loans

Credit Analysis

Banking

# Scott Adkins

A passionate credit union advocate who empowers organizations through interactive consulting engagements.

Ogden

## Summary

Experienced Chief Executive Officer and Chief Lending Officer with a demonstrated ability to engage team members, deliver exceptional results and create amazing member experiences. Skilled in Portfolio Management, Commercial Lending, Banking, Credit Analysis, Strategic Planning and Leadership Development. Motivational leader who creates a compelling vision for others to follow. Strong business development professional with a Graduate Banking Degree from Gonzaga University and Pacific Coast Banking School - University of Washington.

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## Experience

### CU Lending Advice

Senior Lending Consultant

January 2021 - Present (8 months)

United States

After 30+ years serving in the credit union movement as CEO & CLO, it is now my privilege to give back and share some of my knowledge and learning to progressive organizations. Areas of consultation focus include: Business Services, Loan Participations, Executive Leadership Development, Strategic Planning, Mergers, and much more. Message me with your needs and let's talk.

### Gesa Credit Union

Executive Vice President - CLO

August 2019 - December 2020 (1 year 5 months)

Greater Seattle Area

Lead all lending functions and serve as a member of Executive Leadership Team.

### Inspirus Credit Union

President/CEO

October 2013 - August 2019 (5 years 11 months)

## Greater Seattle Area

It is my privilege to serve the 80,000 members and 130 employees of Inspirus Credit Union (formerly School Employees Credit Union of Washington).

As the largest educationally-focused credit union in Washington, we are proud to make a difference in the lives of those who make a difference educating others.

## Gonzaga University Graduate School of Business

Adjunct Finance Professor

August 2011 - December 2013 (2 years 5 months)

Spokane, WA

I am blessed to work with the finest graduate business faculty and MBA students in the country.

## STCU

Vice President - Lending

August 2002 - October 2013 (11 years 3 months)

Executive leadership role over the entire lending division and accountability for \$1.3B loan portfolio.

## Zions Bank

Consumer Loan Team Leader, Branch Mgr

August 1997 - April 2001 (3 years 9 months)

## Norwest Financial

Branch Manager

September 1988 - August 1997 (9 years)

Northwest

Successfully managed several consumer finance offices in Washington, Montana, and Utah. Received the prestigious "Star Performer Award" in 1993. Consistently achieved business goals and received "distinguished" performance ratings.

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## Education

Gonzaga University Graduate School of Business

Graduate, MBA · (2006 - 2010)

Pacific Coast Banking School - University of Washington

Graduate, Banking · (2010 - 2012)

Brigham Young University

BS, Finance · (1985 - 1988)

## Contact

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Spokane, WA  
5093409747 (Work)  
ty.barbery@raymondjames.com

www.linkedin.com/in/ty-  
barbery-7775809 (LinkedIn)  
raymondjames.com/smicd.htm  
(Other)

## Top Skills

Retirement  
Finance  
Retirement Income

## Languages

Spanish (Limited Working)

## Certifications

Series 7, 66, and 63

# Ty Barbery

Financial Advisor at Raymond James  
Spokane-Coeur d'Alene Area

## Summary

My practice focuses on creating financial strategies for families to help them pass on their legacies according to their plan. I have 15 years of experience helping families meet their specific financial goals.

Focuses: Long Term Care, Estate Considerations, Retirement Planning, Retirement Income, Life Insurance, 401k Plans, SIMPLEs, SEPs

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## Experience

### Raymond James Financial Services

Financial Advisor

April 2021 - Present (4 months)

Spokane-Coeur d'Alene Area

Securities offered through Raymond James Financial Services, Inc., member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc.

For important disclosure information, please see "Social Media Disclosure" link in the "Contact Info" section.

### Gonzaga University

Adjunct Professor

August 2018 - Present (3 years)

Spokane, Washington

### Edward Jones

15 years

Area 1 BRIDGE Leader for Inclusion and Diversity

October 2018 - Present (2 years 10 months)

Spokane, Washington

Financial Advisor

August 2006 - April 2021 (14 years 9 months)

Spokane, Washington

I'm a financial advisor with Edward Jones, a financial-services firm dedicated to serving the needs of individual investors. With nearly 17,000 financial advisors serving nearly 10 million investors, our firm has been built on the belief that the only way to do business is on a one-on-one, personal basis. We do that by getting to know you, understanding your goals, and developing individualized strategies to help you reach them. My branch office administrators, Trish Lasich, Dawn Keck and I work as a team to give you the personal service you deserve when it comes to planning for your financial future. Please call or stop by my office, or visit [www.edwardjones.com](http://www.edwardjones.com) for more information.

### Diverse Inclusion Specialist

October 2017 - August 2018 (11 months)

Region 172

I am responsible for developing, advocating, retaining, and recruiting for Financial Advisors of diverse backgrounds.

### Recruiting Leader

October 2015 - October 2017 (2 years 1 month)

Region 172

### United States Air Force

Evaluator Pilot

1997 - 2006 (9 years)

Spokane, Washington Area

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## Education

### United States Air Force Academy

BS, Economics · (1993 - 1997)

### College of Financial Planning

Master Planner of Advanced Studies, Personal Finances · (2015 - 2017)

## Contact

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[www.linkedin.com/in/jon-dawn-6698443a](http://www.linkedin.com/in/jon-dawn-6698443a) (LinkedIn)  
[lbcapitalmgmt.com](http://lbcapitalmgmt.com) (Company)

# Jon Dawn

Principal at Long Bridge Capital Management  
Spokane

## Experience

Long Bridge Capital Management  
Principal  
2019 - Present (2 years)  
Registered Investment Adviser

Gonzaga University  
Adjunct Professor  
2016 - 2019 (3 years)

UBS Financial Services Inc.  
Financial Advisor  
2014 - 2019 (5 years)

CFA Society Spokane  
Board Member  
2010 - 2016 (6 years)

Umpqua Bank  
Corporate Accountant  
2013 - 2014 (1 year)

Sterling Savings Bank  
Corporate Accountant  
2004 - 2013 (9 years)

Williams & Webster P.S.  
Public Accounting  
2000 - 2003 (3 years)

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## Education

Gonzaga University

## Contact

Demars Financial Group LLC  
104 S. Freya Suite 218  
Lilac Flag Building  
Spokane, WA 99202  
PH: 509.536.9556  
FAX: 509.232.6604

Fidelity Financial Services Inc  
805 Frontage Rd #200A  
Kenai AK 99611  
PH: 907-283-3060  
FAX : 907-283-3866  
509-536-9556 (Work)  
david@demarsfinancial.com

[www.linkedin.com/in/ddemars](http://www.linkedin.com/in/ddemars)  
(LinkedIn)  
[www.DemarsFinancial.com](http://www.DemarsFinancial.com)  
(Company)  
[YourFidelity.org](http://YourFidelity.org) (Company)

## Top Skills

Customer Service  
Strategic Planning  
Leadership

## Languages

Spanish (Full Professional)  
Portuguese (Elementary)  
English (Full Professional)

## Certifications

Certified Financial Planner  
Chartered Life Underwriter  
Chartered Financial Consultant

# David Demars, MBA, CFP, CLU, ChFC

Wealth Investment Advisory Business  
Spokane-Coeur d'Alene Area

## Summary

My wife and I enjoy spending time with our 7 children. We enjoy mountain biking in the sun, and skiing in the snow. As a 22 year Wealth Manager veteran, at Demars Financial Group LLC we specialize in Investment Advisory Services, Retirement Income Planning, Estate Planning, Personal Tax Planning. I participate in the community by giving my time to my church and teaching Finance as an adjunct professor to the MBA students at Gonzaga University. I have a passion for helping my clients accumulate and preserve their wealth through diversified investments and personal tax planning.

David Demars MBA, CFP, CLU, ChFC

Investment Advisory Services offered through Demars Financial Group LLC

Securities are offered through Crown Capital Securities. Member FINRA/SIPC

Links to [www.finra.org](http://www.finra.org) [www.sipc.org](http://www.sipc.org) and <https://brokercheck.finra.org>

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## Experience

Demars Financial Group  
Owner & Managing Partner  
January 1997 - Present (24 years 8 months)  
Spokane, Washington Area

As Owner & Managing Partner of Demars Financial Group LLC, I provide services including:

- Portfolio Oversight
- Investment Advisory
- Retirement Income Planning
- Personal Tax Planning

-Personal Estate Planning

## FIDELITY FINANCIAL SERVICES INC

Owner & Managing Partner

August 2017 - Present (4 years 1 month)

Kenai, AK

## Price Waterhouse Management Consultants

Consultant

1993 - 1996 (3 years)

Dallas/Fort Worth Area; Tampa FL, Cleveland, OH, Caracas, Venezuela

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## Education

### Gonzaga University Graduate School of Business

Master of Business Administration (MBA), Finance and Financial Management Services · (2013 - 2016)

### College for Financial Planning

Certified Financial Planner, Finance and Financial Management Services · (2000 - 2001)

### The American College

Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU), Financial Planning and Services · (1998 - 1999)

### Brigham Young University

BA, Finance · (1986 - 1994)

## Contact

[www.linkedin.com/in/hajekp](http://www.linkedin.com/in/hajekp)  
(LinkedIn)  
[synergybusdev.com/](http://synergybusdev.com/) (Company)

## Top Skills

Acquisition Integration  
Business Turn-around  
Business Valuation

## Languages

English (Native or Bilingual)  
Czech (Native or Bilingual)  
Russian (Elementary)

## Certifications

Certified Professional Business Coach (CPBC)  
Certified Master Coach (Marketing & Sales)  
Advanced Professional Business Coach  
Certified Value Builder (CVB)  
Certified Master Trainer (Exit/Succession Planning)

## Honors-Awards

2014 Coach Of The Year - North America West Region  
2019 Top Gun - ACT Capital

# Paul Hajek, CMAA, CVA

Helping business owners create and implement exit plans to maximize value of their companies and retire comfortably  
Spokane-Coeur d'Alene Area

## Summary

I am a seasoned Business Coach, Business Valuator, Management Consultant, Exit Planning Advisor, and Mergers & Acquisitions Advisor.

I started my professional career 17 years ago as a NASA Scientist with an MS degree in Optics from University of Rochester, NY. After about 5 years, I became bored with the "black and white" world of science, added an MBA degree to my academic credentials, and spent next 5 years working for several Fortune 1000 companies in Marketing and Finance Management roles. As one of the early partners of Galliard Group since 2005, I grew this organization into a nationwide consulting firm with over 40 licensed family business advisors. I have sold my shares of Galliard Group partnership in 2010 and joined Pro/Vision Coaching as the Chief Operating Officer and Head Business Coach. In 2014, I decided to return to my original business coaching & consulting firm - Synergy Business Development. In 2016, I also became part of ACT Capital Advisors as a Managing Director to expand the business exit planning & implementation focus of Synergy Business Development. Over the last 15 years, I helped hundreds of business owners in the following areas:

- 1) Growth and Profitability (aka Marketing/Sales & Finance)
- 2) Business Systems (aka Management & Operations)
- 3) Exit and Succession Planning
- 4) Selling Companies
- 5) Family Business Succession

I split my time between Bellevue, WA, Portland, OR, and Spokane, WA and spend my free time skiing, traveling, and constantly reading and learning.

"...because you DO NEED a Rocket Scientist to help you build and exit your business."

Specialties: business exit planning and implementation, management succession, business valuations, finance, marketing, operations, strategic planning, mergers & acquisitions, post-merger integration, business and executive coaching, business turn-around, and new product launches.

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## Experience

### ACT Capital Advisors

Managing Director

December 2016 - Present (4 years 9 months)

Greater Seattle Area

I joined ACT Capital Advisors to expand services I provide to my Synergy Business Development clients. ACT Capital Advisors is an M&A advisory firm that represents lower middle market companies across a variety of industries. We provide M&A advisory services to closely held, family-owned, private equity sponsored and corporate shareholders that wish to sell all or a portion of their company.

### Synergy Business Development, LLC

President

December 2004 - Present (16 years 9 months)

Bellevue, WA and Spokane, WA

Synergy Business Development focuses on helping owners of family and closely-held businesses to grow, run, and eventually exit their companies. The company has been in business since 2004.

### Pro/Vision Coaching, Inc.

Chief Operating Officer and Head Business Coach

December 2010 - June 2014 (3 years 7 months)

Bellevue, WA and Spokane, WA

My responsibilities as the COO at Pro/Vision Coaching are:

- Provide and oversee business coaching and consulting services.
- Provide certified business valuation services and guide our clients through exit/succession planning.
- Hire, train, and mentor new business coaches.

## Galliard Group

Partner / Senior Consultant

September 2005 - December 2010 (5 years 4 months)

The Galliard Group focuses on helping family-owned and closely-held businesses. Our consultants provide a wide range of management consulting, business coaching, and succession/exit planning services.

- Along with my business partner, I grew the firm from two partners to a nationwide family business consulting organization with over 40 licensed family business advisors.
- Personally performed Management Consulting and Business Coaching in the areas of strategy, finance, marketing, sales, human resources, and exit/succession planning for hundreds of clients.

## Lazy S Lodge

Owner

June 2000 - June 2007 (7 years 1 month)

South Lake Tahoe, CA

I purchased an old motel in South Lake Tahoe and turned it into a premier destination for skiers and outdoor enthusiasts. I was able to systemize business operations so the organization was able to run profitably without my daily involvement for 7 years.

## Micron Technology, CVI Laser, SAIC, R2 Technology

Engineering, Finance and Marketing Management positions

January 2001 - November 2005 (4 years 11 months)

Mountain View, CA

- Analyzed business strategies and financials of international competitors and presented strategy recommendations at C-level meetings.
- Developed M&A strategies to improve competitive positions.
- Developed and implemented marketing plans.
- Developed key customer relationships through hands-on design of Optical Systems.
- Managed Sales Personnel and Distributors.
- Analyzed new business opportunities and developed strategies to leverage core competencies in new markets.

## NASA Ames Research Center

Optics Engineer & Project Manager

May 1993 - November 2001 (8 years 7 months)

Mountain View, CA

- Developed and supervised NASA Airborne Science Optical Calibration Laboratory.
- Designed Optical Systems for calibration of imaging spectrometers.
- Managed the flow of science data from field collections to analysis by project scientists.
- Mentored and supervised technicians and junior engineers.
- Authored and presented 15 published articles, research papers, and funding proposals.

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## Education

### San Jose State University

MBA, Marketing, Finance · (1998 - 2000)

### University of Rochester

MS, Optics · (1993 - 1995)

### Michigan State University

BS, Physics · (1989 - 1992)

### San Jose State University

Master of Business Administration - MBA, Finance, General

### University of Rochester

Master of Science - MS, Optics/Optical Sciences

## Contact

[hickman@jepson.gonzaga.edu](mailto:hickman@jepson.gonzaga.edu)

[www.linkedin.com/in/kent-hickman-a86864](http://www.linkedin.com/in/kent-hickman-a86864) (LinkedIn)

## Top Skills

Corporate Finance

Economics

Finance

# Kent Hickman

Professor of Business Administration at Gonzaga University  
Spokane Valley

## Summary

Professor of Finance, Gonzaga University 199--Present

Visiting Professor of Business, ESC, Rouen, France, 1999 - Present

Visiting Professor of Finance, Aston Business School, Birmingham, UK, 1997, 2003

Specialties: Taught courses in Corporate Finance, International Finance, Investments

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## Experience

Rouen Business School  
Visiting Professor  
1999 - Present (22 years)

Gonzaga University  
Professor of Business Administration  
August 1989 - Present (32 years 1 month)

Journal Publications Include:

Journal of Financial Economics  
Journal of Portfolio Management  
Financial Management  
Journal of Economic Behavior and Organization  
Journal of Applied Corporate Finance  
Business Horizons  
Accounting Horizons  
Economics Letters  
Journal of Small Business Finance  
Financial Practice and Education  
American Business Review

## Books:

Foundations of Corporate Finance (ITP)  
Value Based Management, Chapter 9 (Wiley)

IQS Barcelona  
Visiting Professor  
May 2013 - June 2013 (2 months)

Catholic University at Ingolstadt, Germany  
Audi Professor of Business  
October 2012 - November 2012 (2 months)

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## Education

Washington State University  
PhD, Finance · (June 1990)

## Contact

[www.linkedin.com/in/ryanmholcomb](http://www.linkedin.com/in/ryanmholcomb) (LinkedIn)  
[fa.ml.com/ryan-holcomb](http://fa.ml.com/ryan-holcomb) (Other)

## Top Skills

Customizable Investment Strategies  
College Education Planning  
Goal Based Wealth Management

## Certifications

Personal Investment Advisor

# Ryan Holcomb

Financial Advisor  
Spokane-Coeur d'Alene Area

## Summary

Ryan Joined Merrill Lynch Wealth Management in 2018 and has over 10 years' of experience in the financial space including working for two Fortune 500 companies in the areas of Financial Analysis and Financial Advising. Ryan is committed to providing clients with a tailored approach to wealth management planning and investment management. He works with individuals, their families and businesses to develop investment plans individually customized to their goals. Ryan and his team advise clients on investing, retirement income planning, liability management, mortgage assistance, insurance management, and estate and wealth transfer planning services.

Ryan received his Bachelor of Arts in Economics and Bachelor of Business Administration from Gonzaga University in 2012. He graduated magna cum laude and was admitted into the Alpha Sigma Nu National Academic Honor Society, the Beta Gamma Sigma National Academic Honor Society, and the Omicron Delta Epsilon Honor Society. He then went on to complete his Master of Science in Finance from Pacific Lutheran University.

Ryan's philanthropic activities include serving on the Development Committee of the HUB Sports Center and on the Mead School District General Advisory Council. Prior to joining Merrill, Ryan served six years as a Computer Systems Network Administrator in the U.S. Air Force as a member of the Washington Air National Guard.

Ryan and his wife Jamie currently reside in the Pacific Northwest with their three sons, Hunter, Parker, and Calder.

\*Lending Services are through Bank of America, N.A.

\*Ryan Holcomb NMLS#1764937

## Experience

Merrill Lynch Wealth Management

Financial Advisor

June 2018 - Present (3 years 2 months)

"We help simplify the complexity in client's financial lives by organizing their finances and creating customized planning and investment strategies based on our client's goals."

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## Education

Pacific Lutheran University - Master of Science in Finance, 3.80

Master's Degree · (2012 - 2013)

Gonzaga University - Bachelor of Arts in Economics, magna cum laude - 3.82

Bachelor's Degree · (2009 - 2012)

Gonzaga University - Bachelor of Business Administration in Finance, magna cum laude - 3.82

Bachelor's Degree · (2009 - 2012)

## Contact

colin@signiacapital.com

[www.linkedin.com/in/colin-kelly-cfa-aa7110a](http://www.linkedin.com/in/colin-kelly-cfa-aa7110a) (LinkedIn)

## Certifications

Chartered Financial Analyst

# Colin Kelly, CFA

Principal - Dir. of Research & Portfolio Manager at Signia Capital Management  
Spokane

## Experience

### Signia Capital Management

11 years 10 months

#### Principal - Dir. of Research & Portfolio Manager

October 2020 - Present (10 months)

#### Portfolio Manager

October 2013 - Present (7 years 10 months)

#### Senior Research Analyst

December 2012 - October 2013 (11 months)

#### Associate Research Analyst

October 2009 - December 2012 (3 years 3 months)

### Hart Capital Management

#### Vice President of Equity Research

January 2004 - October 2009 (5 years 10 months)

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## Education

Gonzaga University - School of Business Administration

## Contact

[www.linkedin.com/in/stevelarsen1](http://www.linkedin.com/in/stevelarsen1)  
(LinkedIn)  
[www.stevelarsen.co](http://www.stevelarsen.co) (Personal)

## Top Skills

Portfolio Management  
Wealth Management  
Retirement Planning

## Certifications

Certified Financial Planner  
Professional  
Business Analytics Nanodegree  
Certified Public Accountant

# Steve Larsen

Financial Planner & Digital Asset Consultant  
Spokane

## Summary

Steve Larsen is the President of Columbia Advisory Partners where he manages financial planning and digital asset strategies for the firm. Through his Crypto for Planners consulting business, he also helps Registered Investment Advisers establish cryptocurrency programs for their clients.

As a Certified Public Accountant and Certified Financial Planner, Steve has spent most of his career as an independent, fiduciary advisor. He also teaches financial planning and cryptocurrency classes at Gonzaga University, and develops continuing education courses for CPAs and CFPs.

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## Experience

Columbia Advisory Partners, LLC  
President  
2004 - Present (17 years)  
Spokane, Washington Area

Gonzaga University - School of Business Administration  
Adjunct Professor Of Finance  
January 2020 - Present (1 year 7 months)  
Spokane, Washington Area

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## Education

Gonzaga University - School of Business Administration  
Master of Accountancy, Finance and Accounting · (2007)

Eastern Washington University  
BA, Management Information Systems/Business Administration · (2001)

## Objective

To obtain a challenging and rewarding leadership position where I can use my skills and experience to achieve the goals of your organization, improve the economic base of the community, and increase the overall wellness of our individual citizens.

## Relevant Experience

### **Cascade Windows, Spokane, WA**

**Chief Financial Officer** – May 1, 2005 to present

- Provided leadership and financial management of a growing two-plant window manufacturing company.
- Directly responsible for leadership of the treasury, financial, accounting, human resources, information and projected management teams.
- Serves as secretary of the Corporation and the Board of Directors

### **Spokane County United Way, Spokane, WA**

**Interim President and CPO** – November 1, 2004 to April 30, 2005

- Six-Month commitment to serve as Interim President and Chief Professional Officer (CPO).
- Providing management of leadership staff and daily office operations.
- Providing on-going communication with the Board and Committee structure for effective governance.
- Serving as spokesperson to various constituencies of Spokane County United Way.
- Providing financial oversight to redesign the financial systems and internal reporting activities for the Board and management-level staff.

### **Empire Health Services, Spokane, WA**

**President and CEO** – July, 2003 to September 30, 2004

- Provided leadership and management of a two-hospital health care delivery system during a time of significant challenge and change. Annual budgets exceed \$250 million dollars.
- Conducted a system-wide strategic plan which included multiple constituencies with diverse and conflicting expectations.
- Implemented a system-wide process improvement and efficiency program to improve the financial status of the organization within an adverse reimbursement climate.
- Served as senior spokesperson to various constituencies of Empire Health Services, Deaconess Medical Center and Valley Hospital & Medical Center on public policy matters regarding healthcare and the needs of the greater Spokane region.
- Provided on-going communication with the Board and Committee structure for effective governance and oversight during turn-around activities.
- Served as the EHS representative on various joint venture boards which were affiliated with EHS.

**Senior Vice President and Chief Financial Officer** – September 15, 1990 to July, 2003

- Responsible for leadership and management of the financial and business departments of a multi-hospital, healthcare delivery system.
- Provided senior-level oversight of the financial-reporting systems of EHS to meet the changing needs of the health system during significant changes in payer reimbursement methodologies.
- Lead the organization in disposing of non-producing and under-producing assets caused by changes in delivery system focus.
- Significantly improved the investment management and monitoring of employee retirement plans, including the diversification and expansion of plan investment alternatives.
- Served as financial representative on all EHS joint-venture and affiliated programs including significant development input on many of the current operating ventures.
- Assisted in the development of three tax-exempt bond issues, raised over \$150 million dollars to fund hospital projects.
- Served as the EHS representative on many community-based economic development and service organizations.

**Anderson, Lutz & Inman, CPA's, Spokane, WA**

**Partner** – 1973 to September 30, 2004

- Served as partner in a Spokane-based accounting firm specializing in the following areas:
  - Personal financial planning, including taxation, estate planning and investment asset allocation reviews.
  - Audits of Pension and Health & Welfare plans, including plan design and investment allocation. Reviewed actuarial reporting and beneficiary benefit calculations.
  - Financial and audit reporting to Boards and individuals including Taft-Hartley, labor-management boards.
  - Management consulting including information technology, financial software and form of organization analysis. Clients included manufacturing, construction and service organizations.

**Staff Accountant** – 1968 to 1973

- Served as staff accountant in a Spokane-based accounting firm prior to obtaining partner status.

**United States Air Force, 1963 to 1967**

- Honorably discharged at the rank of Staff Sergeant.

**Education & Professional**

**Kinman Business University, Spokane, WA**

Diploma in Business Administration, 1972

**College for Financial Planning, Denver, CO**

Designation as Certified Financial Planner (CFP), 1986 (Currently inactive)

**Eastern Washington University, Spokane, WA**

Adjunct Professor – Healthcare Finance (1990's)

**Current Licensure and Professional Memberships**

**State of Washington, Certified Public Accountant** – Cert. No. 3778 - Issued March 26, 1973. (Continually maintained the annual, continuing education requirements – license current)

**Current Memberships and Boards**

Member - American Institute of CPA's  
Member - Washington Society of CPA's  
Millwood Community Presbyterian Church, Board of Elders  
Greater Spokane Incorporated Board of Trustees  
Eastern Washington University School of Business Advisory Committee  
Project Access Advisory Committee  
Spokane Chapter, American Red Cross Disaster Council

**Past Boards Involvement**

Spokane County United Way Board  
Spokane PHCO Board  
Leadership Spokane (Class of 1993) Board  
Inland Northwest Health Services Board  
Inland Northwest Genetics Clinic Board  
Washington State Hospital Association Strategic Planning Committee  
MAC Museum Foundation Board  
Rockwood Retirement Community Board  
Health Improvement Partnership (HIP) Board  
Empire Health Services Board  
Valley Hospital & Medical Center Advisory Board  
St. Lukes Memorial Hospital Board  
Metro Kiwanis Board  
Spokane Jaycees Board

**Business, professional and personal references are available upon request.**

## Contact

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broker@propertybyprime.com

[www.linkedin.com/in/melissa-murphy-a574265](http://www.linkedin.com/in/melissa-murphy-a574265) (LinkedIn)  
[www.instagram.com/melissa\\_murphy\\_prime/](http://www.instagram.com/melissa_murphy_prime/) (Blog)

## Top Skills

Residential Listings  
Real Estate Investment  
Residential Purchases

## Languages

Italian

## Certifications

Certified New Home Sales  
Professionals (CSP)  
CCIM 100

## Honors-Awards

Catalyst Top 20 Under 40  
Business Woman of the Year  
Silver award business woman of the year

# Melissa Murphy

Real Estate Broker, Owner, Investor, Professor, Wife, Mother  
Spokane

## Summary

With a strong understanding of our community and a vision for its future, Melissa Murphy has emerged as a shining star in the Inland Northwest real estate community.

With the exception of a year studying abroad and a stint as a legislative assistant in Washington, D.C. and Olympia, Melissa has lived in inland northwest since her parents moved to the Lilac City from Southern California when she was 1 year old. She served as a Lilac Princess before graduating with honors from Gonzaga Preparatory School.

Melissa graduated from Gonzaga University with a bachelor's degree in political science in 2003 and attended for her masters of business administration degree a couple years later completing the coursework in 2012.

From the time she started her graduate work to present day, Melissa has listed and sold more than 800 homes throughout Spokane and Kootenai County. In addition, she has helped hundres of buyers find the right house at the best price.

Of course, it comes as no surprise to anybody that the real estate market has changed dramatically in recent years, and Melissa has honed her skills to help both buyers and sellers in this new marketplace.

For home sellers, she has developed an accurate barometer of listing performance and how to position a home to get the most showings—and ultimately, the best offer.

For home buyers, she has become intimately familiar with the inventory of homes on the market and what they're worth, as well as an knack for finding diamonds in the figurative real estate rough.

Melissa has the knowledge, skills, and motivation to complete your transaction with a best-scenario ending. She's a bright part of the city's future and can help to make your future brighter as well.

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## Experience

### Prime Real Estate Group

Owner Designated Broker

April 2012 - Present (9 years 5 months)

417 W 1st

As the founder/owner of Prime Real Estate Group, I set the course and vision for the organization, seeking to raise the bar for Real Estate Services in Spokane.

### Gonzaga University Graduate School of Business

Adjunct Professor

March 2019 - Present (2 years 6 months)

Spokane, Washington Area

Teaching part time in the MBA department with a real estate specific course. The intent of the course is cover a wide array of content in the real estate industry from legal concepts, to investment analysis, preparing the student for a greater understanding for both personal and business application in the future.

### Prime Lifestyle Magazine

Editor In Chief

January 2016 - Present (5 years 8 months)

Spokane, Washington Area

Prime Lifestyle Magazine is a quarterly publication focusing on high-end luxury homes in the Pacific Northwest. Enjoy a glimpse of our quality of life that is unsurpassed.

### Prime Real Estate Group Coeur d'Alene | A Melissa Murphy Corporation

Owner | Designated Broker

March 2015 - Present (6 years 6 months)

2065 Riverstone Drive

### One Property Management L.L.C.

Owner

March 2014 - Present (7 years 6 months)

Spokane, Washington Area

Cuisine for a Cause

Co Creator

January 2016 - March 2019 (3 years 3 months)

Spokane, Washington Area

Windermere Manito, LLC

Real Estate Professional

September 2005 - August 2011 (6 years)

Began my career in real estate and quickly grew my services in the residential real estate field.

City of Spokane

Executive Assistant

January 2004 - July 2005 (1 year 7 months)

Washington State Senate

Legislative Assistant

January 2003 - December 2003 (1 year)

Community Colleges of Spokane

Project Employee

2003 - 2003 (less than a year)

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## Education

Gonzaga University

MBA, Marketing · (2005 - June 2012)

Gonzaga University

BA, Political Science · (2001 - 2003)

Washington Institute

Government · (2001 - 2001)

University of San Diego

Political Science · (1999 - 2001)

Gonzaga Prep

· (1995 - 1999)

# Yang (Janice) Ouyang

8316 East Valleyway Avenue, Spokane, WA 99212 | [ouyang@gonzaga.edu](mailto:ouyang@gonzaga.edu) | 509.944.5575

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## EDUCATION

|                                                                                         |                   |
|-----------------------------------------------------------------------------------------|-------------------|
| <b>Gonzaga University</b>                                                               | 09/2014 – 11/2016 |
| Candidate: Master of Business Administration – Entrepreneurship & Finance Concentration |                   |
| International Student Scholarship, Graduate Assistantship                               | GPA: 3.90         |
| <b>Eastern Washington University</b>                                                    | 06/2012 – 03/2014 |
| Bachelor of Arts in Business Administration – Management                                | GPA: 3.72         |
| <b>Jiangxi Vocational Technical College of Industry &amp; Trade</b>                     | 09/2007 – 06/2010 |
| Three-year Technical Accounting Degree                                                  | GPA: 3.63         |
| College Academic Outstanding Scholarship                                                |                   |

## EXPERIENCE

### Gonzaga University (Spokane, WA)

- International Student Wellness Assistant**, Int'l Student & Scholar Services 05/2015 – Present
- Provide administrative support to ISSS Office, and student support services to Gonzaga's international community, including ESL, undergraduate, exchange/visiting, sabbatical, graduate, law, and PhD students.
  - Supervise and plan orientations, workshops, tours and other events for international students.
  - Supervise student workers; facilitate communication and serve as a mediator between international students and on and off campus constituents.
  - Assist with international student recruitment in China.
- Program Assistant**, International Student & Scholar Services 08/2014 – 05/2015
- Advise students with immigration policies, medical insurances, immunization files, etc.
  - Manage student files with Banner SIS, NOLIJ, and SharePoint.
- Graduate Assistant**, Graduate School of Business 09/2014 – 05/2015
- Performed research and assisted in teaching undergraduates for Dr. Todd Finkle.

### Eastern Washington University (Cheney, WA)

- Travel Accounting Assistant**, General Accounting Department 05/2013 – 03/2014
- Administered travel reimbursements for 1,632 university faculty and staff.
  - Followed up on missing documents and corrections; input data into Banner SIS.
  - Monitored compliance with State of Washington accounting policies.
  - Collaborated with Accounts Payable, Grant Office, and Payroll Office.
- PLUS Program Facilitator**, The Academic Success Center 04/2013 – 03/2014
- Tutored study groups of 15 undergraduates for Decision Science statistics course.
  - Activated students to achieve deeper learning and higher grades.
- Orientation Advisor**, New Student Transitions & Parent Programs 03/2013 – 10/2013
- Developed 30+ New Student and Parent Engagement events; led group activities.
  - Participated and coordinated in events planning, scheduling, and implementations.

# Yang (Janice) Ouyang

8316 East Valleyway Avenue, Spokane, WA 99212 | [ouyang@gonzaga.edu](mailto:ouyang@gonzaga.edu) | 509.944.5575

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## Genesis Marketing (Spokane, WA)

### Junior Research Analyst Intern

11/2012 – 03/2013

- Gathered and organized online research data; prepared materials for client presentations.

## Shenzhen American International School (Shenzhen, China)

### Administrative Assistant for American Principal

09/2011 – 06/2012

- Developed inventories for 36,743 textbooks and library books for new campus.
- Planned and organized 11 student-related events and celebrations.
- Communicated throughout campus, solved daily issues and emergencies.
- Prepared agendas; took minutes for board, staff, and parent meetings.
- Translated documents between English and Mandarin; interpreted for conferences.

### Admissions Clerk

07/2011 – 09/2011

- Assisted with marketing plans and implementations.
- Collaborated to recruit 82 new students; collected tuition fees; managed student files.
- Provided administrative, clerical, and receptionist services.

## VVfamily.com (Shenzhen, China)

### Web-Marketing Specialist / Teaching Assistant

02/2011 – 06/2011

- Recruited 1,000 + online customers for the start-up learning website, VVfamily.com.
- Recruited 13 new students for one to one tutoring; collected fees; managed student files.
- Prepared teaching materials and activities; assisted with classroom instructions.

## Japan Li Quest Trading Company (Dongguan, China)

### Assistant Accountant

07/2009 – 08/2010

- Prepared monthly financial statements and tax reports.
- Assisted with hiring and mentoring personnel, as well as payroll processes.
- Assisted with quality control projects in manufacturing facilities.
- Coordinated repairs for office equipment and other company support services.

## PROFESSIONAL DEVELOPMENT AND SKILLS

**Voting Member**, Graduate Student Council, Gonzaga University, 2014-2016

**Member**, Intercultural Student Union, Gonzaga University, 2014-2016

**Vice President-Finance**, Alpha Kappa Psi Business Fraternity Eta Phi Chapter, 2012-2014

**Vice President**, Connections in Human Resources Club, 2012-2014

**Member**, The Honor Society of Phi Kappa Phi, 2012-Present

**Attendee**, Principled Business Leadership Institute, February 2013

**Attendee**, New Officers Training at University of Washington, April 2013

**Volunteer Receptionist**, Volunteers of America Hope House, 2012

**Certificate of Accounting Professional**, Shenzhen, China, 2011- Present

Proficient in Microsoft Outlook, Word, Excel, PowerPoint, Banner SIS, NOLIJ, and SharePoint.

## Contact

[www.linkedin.com/in/david-pointer-0a96b613](http://www.linkedin.com/in/david-pointer-0a96b613) (LinkedIn)  
[www.vicapitalmanagement.com](http://www.vicapitalmanagement.com)  
(Company)

## Top Skills

Management  
Strategic Planning  
Mutual Funds

# David Pointer

Chairman of the Board and CEO Novation Companies, Inc.  
Newman Lake

## Summary

Novation owns Healthcare Staffing, Inc. (HCS). HCS provides outsourced health care staffing and related services in the State of Georgia. Services are performed by medical staff on-site at the Company's clients' facilities. More information about HCS can be found at their website - <https://www.healthcare-staffing.com/>

Novation also owns a portfolio of mortgage securities which generate earnings to support on-going financial obligations. Our common stock is quoted on the OTCQX market of the OTC Markets Group, Inc. under the symbol "NOVC".

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## Experience

VI Capital Management, LLC

Managing Partner

January 2008 - Present (13 years 7 months)

CompuMed, Inc.

Chairman of the Board of Directors

December 2014 - Present (6 years 8 months)

Greater Los Angeles Area

CompuMed provides patients and medical facilities with telemedicine services increasing efficacy and decreasing healthcare costs.

<http://compumedinc.com/>

Solitron Devices Inc

Chairman Of The Board

August 2014 - Present (7 years)

West Palm Beach, FL

Solitron Devices is a supplier of electronic components.

<https://www.solitrondevices.com/>

ICM Investment Management

Sr. Portfolio Manager

2003 - 2007 (4 years)

Invesco Aim  
Portfolio Manager  
1999 - 2003 (4 years)

GSIC  
Summer Intern  
1998 - 1998 (less than a year)

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## Education

The Wharton School  
MBA, Finance · (1997 - 1999)

Central Washington University

## Contact

[www.linkedin.com/in/marcin-slazak-79617385](https://www.linkedin.com/in/marcin-slazak-79617385) (LinkedIn)

## Top Skills

Microsoft Office  
Microsoft Excel  
Microsoft Word

## Languages

Polish

# Marcin Slazak

Adjunct Professor Of Finance at Gonzaga University School of Business  
Spokane

## Summary

Experienced Mathematics Teacher with a demonstrated history of working in the Banking industry. Skilled in Microsoft Word, Sales, Management, Polish, and Adobe Photoshop. Strong education professional with a Master of Business Administration - MBA focused in Finance from Gonzaga University Graduate School of Business.

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## Experience

Quicken Loans  
Credit Underwriter II  
August 2020 - Present (1 year)

Gonzaga University - School of Business Administration  
Adjunct Professor Of Finance  
January 2020 - Present (1 year 7 months)  
Spokane, Washington Area

Washington Federal  
3 years

Mortgage Underwriter  
April 2019 - 2020 (1 year)

Mortgage Loan Processor  
September 2017 - March 2019 (1 year 7 months)  
Spokane, Washington Area

McGavock High School  
Mathematics Teacher  
August 2016 - June 2017 (11 months)

Chalres Henderson Academy  
Mathematics Teacher  
September 2015 - September 2016 (1 year 1 month)

Chicago

### American Eagle Airlines

Fleet Service Clerk

June 2010 - September 2015 (5 years 4 months)

Chicago O'Hare Airport

Responsible for loading and unloading cargo as well as transporting cargo to and from aircraft. De-ice aircrafts and pushing out/towing aircraft and related guideman functions.

### Sauganash Elementary School

Student Teacher

March 2015 - May 2015 (3 months)

### Berkshire Hathaway HomeServices

Finance Intern

January 2015 - March 2015 (3 months)

Elk Grove Village

- Used Comparative Market Analysis (CMA) to determine value of residential homes for buying, selling and investment purposes.
- Shadowed a Senior Loan Officer on analyzing loan pricing along with assessing loan applications and loan processing with documentations and fees.
- Determining Return on Investments with Commercial Real Estate (Apt. Buildings)

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## Education

### Gonzaga University Graduate School of Business

Master of Business Administration - MBA, Finance · (2017 - 2019)

### DePaul University

Bachelor of Education (B.Ed.), Mathematics · (2013 - 2015)

## Contact

[www.linkedin.com/in/robert-stephens-839356130](http://www.linkedin.com/in/robert-stephens-839356130) (LinkedIn)

## Top Skills

Public Speaking  
Leadership  
Customer Service

## Languages

English

# Robert Stephens

Restoration Biologist at Avista  
Spokane

## Experience

Avista  
Restoration Biologist  
May 2019 - Present (2 years 4 months)

Spokane Tribe of Indians  
Forest Ecologist  
December 2017 - Present (3 years 9 months)  
Wellpinit, WA

Northwestern Mutual  
5 years 2 months  
Associate Financial Representative  
July 2017 - Present (4 years 2 months)  
Spokane, Washington Area

Financial Representative  
July 2016 - July 2017 (1 year 1 month)

Spokane Tribe of Indians  
Wildlife Mitigation Program Coordinator  
July 2014 - July 2016 (2 years 1 month)  
Wellpinit, WA

Hawai'i Division of Forestry and Wildlife  
Mauna Kea Forest Restoration Project Coordinator  
June 2009 - July 2014 (5 years 2 months)  
Hilo, Hawaii

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## Education

University of Wyoming  
M.S. , Zoology and Physiology · (1999 - 2001)

Colorado State University

Bachelor of Science (B.S.), Wildlife Biology · (1991 - 1993)