

Strategic Partner Guide

Forum Topics • Services • Contacts

How to Use

Our Strategic Partners support entrepreneurs in Portland in extraordinary ways. Use this guide to **bring experts into your Forum (for free!) to speak on a variety of topics**; reach out when your business needs arise; and learn the faces of these Portlanders who go above & beyond in their efforts to support our EO community.



Meet Our Partners

Each of our partners has been carefully vetted by EO Portland Members for excellence in service and cultural alignment with EO Core Values. We recommend them wholeheartedly.



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STRATEGIC PARTNER

Capacity Commercial

Commercial Real Estate



Services

The Diamond Team enjoys the experience garnered from closing nearly 2 billion dollars of sales transactions, including commercial and residential development land, shopping centers, office properties, NNN investment assets, multifamily buildings, and mixed-use developments.

Capacity Commercial Group is unique in that it is a one-stop shop that specializes in all commercial needs including Industrial, Retail, Office, Investment Sales, and Multi-Family.

- **Leasing Advice, Brokering, and Negotiation**
- **Retail Tenant/Landlord Representation**
- **Development, Investment & Land Sales**



Forum Topics

Invite them to present at your next Forum Meeting, or tell them what you'd like to learn about, such as:

Q&A: Being a Commercial Landlord

Q&A: Being a Retail Tenant

How to Prepare for Commercial Real Estate Transactions

Market Investment Analysis



Contact



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PARTNER & PRINCIPAL BROKER
THE DIAMOND TEAM

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STRATEGIC PARTNER

Cápita Works

Nearshore Virtual Employee Recruitment



Services

We recruit and hire Virtual Assistants (VAs) and other virtual employees based in Mexico who can handle a variety of roles and responsibilities in your business, allowing you to invest your time in what matters the most. The VAs we hire range from executive assistants to marketing professionals to customer service. From entry level positions to more seasoned professionals, we've got you covered. By hiring a VA in Mexico you will save up to 70% in salaries without having to deal with the complications of hiring people on the other side of the world.

- **No Talent Shortage: Executive Assistants, Marketing Coordinators, Bookkeepers, Designers, Customer Service, Content Creators & More**
- **Fully Bilingual, Well-Educated, In Your Time Zone, Able to Travel**
- **We Handle Insurance and Reduce or Eliminate Tax & Legal Liability**



Forum Topics

Invite them to present at your next Forum Meeting, or tell them what you'd like to learn about, such as:

Why Nearshoring a VA Is the Best Solution to the US Talent Shortage

Scaling Up Your Business by Leveraging Global Talent

Myths & Facts About Hiring a VA

Return on Time (ROT): The Most Underrated KPI



Contacts



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STRATEGIC PARTNER

Cross Financial

Financial Planning & Business Advisory



Services

Cross Financial was created in 2003 by Jay Torgerson and Mathew Whiteaker, who had a dream of developing a financial services agency with a clear mission and strong values. In 2014, they grew the company to include accounting services making Cross Financial a comprehensive solution for their clients.

We take the time to really get to know our clients. What are their goals? What are their dreams? What are they passionate about? It's personal first, then business.

- **Financial Planning**
- **Retirement Income Planning**
- **Business Advisory and Valuation Services**



Forum Topics

Invite them to present at your next Forum Meeting, or tell them what you'd like to learn about, such as:

Retirement or Vocational Freedom: What is Your Goal?

Business Valuation: Is It All Worth It?

What Are You Doing?!? It's Time to Really Answer this Question!

Life is a Game of Cashflow—Are You Prepared to Win?



Contacts



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STRATEGIC PARTNER

EOS® Worldwide

Entrepreneurial Operating System® Implementation



Services

Eliot Wajskol helps entrepreneurs and their leadership teams solve root problems, lead more effectively, and gain Traction® in their businesses through a simple, proven operating system.

- **Vision:** Getting everyone in your organization 100% on the same page with where you're going and how you plan to get there.
- **Traction:** Instilling focus, discipline, and accountability throughout the company so that everyone executes on that vision--every day.
- **Healthy:** Helping your leaders become a more cohesive, functional, healthy leadership team.

Implementing Entrepreneurial Operating System® with Eliot can help your leadership gel and your business grow, improving your team's focus and accountability.



Forum Topics

Invite them to present at your next Forum Meeting, or tell them what you'd like to learn about, such as:

Get a Grip on Your Business with the Entrepreneurial Operating System®

Crystallize and Maximize Your Visionary/Integrator Relationship

Right People, Right Seat: How to Do It When It Seems Impossible

Hitting the Ceiling: Breaking Through with the 5 Foundational Leadership Abilities



Contact



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STRATEGIC PARTNER

HR Annie Consulting

HR & Recruitment



Services

HR Annie is a local, woman-owned business that provides customized human resources consulting, solutions, training, and recruitment support.

We understand that a one-size-fits-all approach does not allow a business to reach their fullest potential. From one-off projects to full-time HR outsourcing, our experienced and passionate team has allowed us to provide smart, sensible, affordable HR solutions to our clients, including:

- **Customized Human Resources Solutions**
- **Employee, Manager, and C-Suite Training**
- **Recruitment, Hiring & Onboarding**
- **Wage & Compensation Strategy**



Forum Topics

Invite them to present or tell them what you'd like to learn about, such as:

HR Infrastructure & Strategic Planning

Diversity, Equity, Inclusion & Belonging

Safety Programs, Emergency Response Plans, Worker's Compensation

**Handbook Policies & Compliance
Separations & Terminations**

Performance Evaluation, Coaching & Conflict Resolution



Contacts



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STRATEGIC PARTNER

Miller Nash LLP

Legal Services



Services

Miller Nash is a nationally recognized, industry-focused law firm with offices in Oregon, Washington, California, and Alaska.

Miller Nash is administratively organized by industry teams to ensure that our professionals develop a deep understanding of the business issues and opportunities faced by our clients. Miller Nash's practice areas include (but are not limited to):

- **Employment Law**
- **Intellectual Property**
- **Mergers & Acquisitions**
- **Business Formation & Financing**
- **Franchising & Licensing**



Forum Topics

Invite them to present or tell them what you'd like to learn about, such as:

Q&A: Employment, Benefits & Taxes

Protecting Your Intellectual Property

Transition Planning: Get Prepared



Contacts



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STRATEGIC PARTNER

Pacific West Bank

Banking



Services

Pacific West Bank is a local business bank founded and headquartered in the Portland metro area. All decisions are made here by local banking professionals. We offer a full suite of business banking and commercial lending products with features and flexibility to meet your specific needs.

Our mission is to understand your business, develop solutions to help you grow, and work together toward mutual success.

- **Consultative Approach to Lending Products**
- **Full Suite of Business Banking Solutions**
- **Treasury Management Services**

Forum Topics

Invite them to present or tell them what you'd like to learn about, such as:

Commercial Real Estate Financing

Equipment Financing

Working Capital Financing

Fraud & Cybersecurity Protection Tools in Banking

Treasury Management & Payment Services

Contacts



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STRATEGIC PARTNER

Perkins & Co.

Accounting & Tax Services



Services

Perkins & Company is the leading regional accounting and professional service firm offering sophisticated solutions to high-profile, high-potential clients who value our focus on talented people and our passion to enhance their success.

- **Accounting & Tax Preparation**
- **Business Transition & Succession**
- **Business Valuation**
- **Employee Benefit Plan Audits**
- **Legacy Planning**
- **Opportunity Zones**
- **Risk Management**
- **SOC Reports**

Forum Topics

Invite them to present or tell them what you'd like to learn about, such as:

Entity Structuring

Tax Consequences of Different Types of Equity Compensation

Revenue Recognition Issues

Tax Consequences of a Stock Vs. Asset Acquisition

International Expansion Issues

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STRATEGIC PARTNER

SKA Wealth Strategies

Financial Planning & Business Advisory



Services

Acting as your personal financial strategists, we put in the time to develop a deep understanding of your unique situation. Equipped with tools you probably didn't know existed, you'll set the priorities as we capitalize on opportunities and carefully avoid pitfalls. You'll be empowered by these financial insights, strategies and readiness not only in your business life, but also in your personal life. And not only for today's needs, but tomorrow's as well.

We've built a deep network of well-vetted professionals in the fields of law, accounting, private equity, and VC funding, as well as investment banks well versed in middle-market mergers and acquisitions.

- **Financial Strategy & Planning**
- **Business Sales, Mergers & Acquisitions; Exit Analysis**
- **Retirement Plans**



Forum Topics

Invite them to present or tell them what you'd like to learn about, such as:

Determining the Exit Valuation You'll Need

Using Philanthropic Planning to Mitigate Taxes

Tax Advantaged Retirement Income Strategies

Earning More on Your Cash Balances

Tools to Retain Key Employees



Contacts



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STRATEGIC PARTNER

Stoller Family Estate

Wine, Corporate Gifting & Hospitality



Services

Along with producing great wine, we try to offer solutions to individuals and companies needs. We like to make sure we have wine at all price points, making it accessible for all wine drinkers. For companies, we make it as easy as possible to send wine as a thank-you to clients and we have plenty of space for corporate events and meetings as a wine country destination.

- **Gifts for Clients Made Easy: Handwritten Notes & Box Sets**
- **EO Members Get 20% Off of Retail**
- **Special Rates Available for Event Space at Stoller Experience Center in Dayton, OR**



Forum Topics

Invite them to present at your next Forum Meeting, or tell them what you'd like to learn about, such as:

Sustainability as a Business Practice

Impact of Rapid Company Growth (Stoller Quadrupled Wine Production & Wine Club Membership)

State of the Wine Industry in Oregon



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