

**Inc.  
5000**

# **The Stories That Power Growth**

**Inc. 5000 Conference & Gala  
October 22 - 24, 2025**

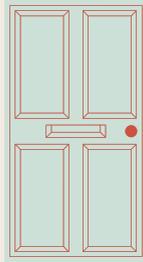


CONGRATS TO THIS YEAR'S INC. 5000

# YOU'VE ARRIVED

Welcome to the next phase of your company's growth.  
We're proud to celebrate the key to your success: you.





# How the Inc. 5000 Honorees Epitomize Resilience

—By Sarah Lynch, Recognition Program Manager

**F**

For over 40 years, Inc. has honored the elite cadre of companies achieving every entrepreneur's aspiration: fast growth. Finding that accelerator, that sublime moment of liftoff, is the stuff of founders' dreams – but in 2025, the pathway to growth is increasingly fraught. Indeed, given today's rapid changes in technology, political uncertainty, and economic headwinds, building a fast-growing business requires the kind of ingenuity and adaptability that distinguishes the great companies and leaders from the good.

The 2025 Inc. 5000 honorees embody this kind of extraordinary strength under pressure. The 5,000 companies on the 44th edition of this list achieved a median revenue growth rate of 169 percent over the three-year period from 2021 to 2024, with that rate soaring to 1,552 percent among the top 500. The 5,000 also reached a collective \$300 billion in revenue in 2024

– over \$177 billion more than in 2021 – and added 536,086 jobs to the economy.

The revenue growth of this year's top company, Akool (No. 1), is particularly gob-smacking: 37,364 percent over three years. Founder Jeff Lu was working for Google when he started a generative AI side hustle of his own, eventually breaking away from the tech giant. After landing a crucial client in Coca-Cola, Akool leveraged its cutting-edge AI capabilities – providing companies with AI-powered avatars – to secure more and more business that propelled the company to \$40 million in revenue in 2025 and approximately 100 employees.

But what's so endlessly fascinating about the Inc. 5000 is just how different each company's growth story is, as well as the unique challenges they've each faced on the road to success. Pace Protection (No. 269) founder Shaun Pace, for instance, originally set out to train as a minister, but after taking a job at a security company, he realized that he wanted to start a business of his own. Roberto Guerrieri and Stuart Illian, the founders of Bluetail (No. 309), were former Apple colleagues who identified and solved for a hole in the aviation market: the digitization and storage of aircraft records. And Vanessa Risetto, co-founder of the telehealth nutrition startup Culina Health (No. 564), raised a Series A for her business while battling breast cancer. Each company's story is both inspiring

and instructive for fellow entrepreneurs. This year, though, it's particularly clear that Inc. 5000 leaders aren't getting comfortable in their success: They are continually pushing boundaries and strategizing on how to operate more efficiently in pursuit of their goals. Nowhere is that clearer than in their adoption of AI. In this year's Inc. 5000 CEO Survey, leaders shared that they are increasing AI investments across the board: in marketing, sales, services, account management, billing, and more.

They're also clear-eyed about the challenges they face – tariffs, for one. Over 50 percent of this year's survey respondents said tariffs and trade were very or extremely important to their business – an increase of 19.6 percentage points over last year's. Meanwhile, many are facing a daunting fundraising environment, with the average of reported Series B and C raises among these CEOs dropping 51.1 and 67.3 percentage points, respectively, from those of 2024's respondents.

It's evident, then, that the missions and strategies that helped these Inc. 5000 leaders climb to the top are going to become even more crucial as they navigate this new set of challenges. But with the success they've already achieved, they've proved that they have the fortitude to face whatever comes. Enjoy learning more about each of their stories of resilience and triumph on the following pages.



**Inc.  
5000**

# Congratulations to this year's Inc. 5000—you've arrived!



Small businesses represent the American dream: full of hope, vision, and possibility. At Capital One Business, we recognize that making the Inc. 5000 represents more than just fast growth. It's the validation that following your own path, taking risks, and facing down challenges to realize your vision was the right thing to do.

Capital One Business takes our role as champions and partners of small businesses seriously. We first joined forces with Inc. in 2019 around a shared dedication to the innately human journey of entrepreneurship. In our seventh year as the official partner of the Inc. 5000, our favorite part of supporting this inspirational community continues to be learning from the game-changing founders behind it. We love every opportunity to hear your unique stories, passions, and hard-won insights that define how your business made it to this milestone.

Year over year, the Inc. 5000 Conference presents an invaluable opportunity for us to spend three energizing days meeting, elevating and learning from you. We hope that you will take a few moments during your time in Phoenix to celebrate with us. Whether it's stopping by our Capital One Business space in the marketplace to connect and recharge, taking a nostalgic trip down memory lane at our Inc. 5000 Conference party, or toasting with us and your peers at the Gala on Friday night, we cherish every opportunity to elevate your victories and understand how we can better support your needs.

On behalf of all of Capital One Business, thank you for joining us this week, and welcome to the next phase of your company's growth. We're proud to celebrate the key to your success: you.



Caryn Bonner  
VP, Brand and Acquisitions Marketing  
Capital One Business



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SINGLE MALT SCOTCH WHISKY | SINGLE MALT SCOTCH WHISKY

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# This Upscale Meal-Delivery Service Has Attracted 180 Chefs and \$350 Million in Sales

**CookUnity (No. 558) connects professional chefs with consumers and delivers fresh meals for between \$11 and \$14 a pop. —As told to Rob Verger**

*From the September 2025 issue.*

# M

Mateo Marietti and his wife, Clara Quiroga, moved from Argentina to New York City in 2016 with a plan to bring a meal-delivery startup to the U.S. The business, CookUnity, connects professional chefs with consumers via an app and delivers fresh meals for between \$11 and \$14 a pop. Today, the company works with approximately 180 chefs, operating seven kitchens in the States and one in Canada. Though annual revenue in 2024 reached \$350 million, getting chefs to warm up to the idea of a delivery service took years of work. Marietti, who spent his formative years on a large farm, had to navigate a new culture and market while trying to get the company off the ground in New York. And while many chefs seemed interested, there was no sense of urgency to sign up. But everything changed after Covid hit, as Marietti explains.

My family on my father's side are farmers, and I grew up on a farm. If we wanted milk, we went to the cow, and if we wanted eggs, we went to the chickens.

For meat, we had to slaughter an animal. I remember that very visually. When I moved to Buenos Aires in the early 1990s and experienced food in the supermarket aisle—already packaged, and in many cases processed—the difference between one way of eating and the other was very clear to me.

My first job was at the Danish shipping and logistics company Maersk. They have a trainee program that has you do a different job in a different department every three months, and you report to the local CEO. You're training to be future management. But doing a classic corporate job wasn't the route for me. I had an idea for my first company, a food-delivery-only concept, so I left. It had some success, but I also found a lot of limiting factors that I thought were more structural—flaws of the business model that I couldn't change. That's what inspired me to start CookUnity.

**Food plays at least two important roles for us. Culture and community is the first. At the same time, food is also nourishment and fuel and nutrition.**

—Mateo Marietti,  
co-founder, CookUnity

Food plays at least two important roles for us. Culture and community is the first. At the same time, food is also nourishment and fuel and nutrition. And people are becoming more aware of this.

We work directly with chef entrepreneurs, some famous and some up-and-comers. In total, the chefs at CookUnity are employing more than 1,200 cooks, and the average chef at CookUnity is making \$800,000 a year. The top-seller chefs are making \$5 million to \$6 million a year. It's a completely transformative opportunity for them.

CookUnity is my first company I built in the U.S. I didn't have a network here. It's also my first time raising capital. My previous business, a food-delivery company called Grupo Pop, was bootstrapped. The first two to three years were really hard. We ran out of money a few times. I didn't take a salary for some time, and in 2019, I had to put my own money into the business.

When I moved here, there was a learning curve about both the local market and the competition. There was also a learning curve about the culture. There was a network of talent I didn't have, and there was investment I needed. I first thought that CookUnity should be an on-demand service—people order now and get food, warm, in 30 minutes. So we launched like that, and we learned a ton. The most interesting insight we had was that our best customers were not eating the meals in the moment. Our best customers were ordering four, six,

**YES, CHEFS!**  
Clara Quiroga (left) and  
Mateo Marietti founded  
CookUnity together.  
Quiroga is the chief  
business officer.



eight meals, putting them in the fridge, and doing meal planning. So that's where we adjusted and launched the current weekly meal plan service.

In 2018 and 2019, I was knocking on the doors of the best restaurants in New York, and when I had a chance to talk to a chef or the sous-chef, they would tell me, “Oh,

really cute concept—maybe next year.” They didn't have any urgency. It was hard. I did deliveries myself for a year. Then, Covid hit. In 2020, we went from not persuading any famous chefs in New York to join—and having raised very little money—to having some of the best chefs join, and raising a more meaningful round.

Covid was the thing that led more established chefs to try different business models. And then things started to accelerate. Several well-known New York chefs joined: Esther Choi, Einat Admony from Balaboosta, Marc Forgione. All of a sudden, there wasn't just one chef or one reason to come check out CookUnity. There was a movement.

# How I Raised \$10 Million While Beating Breast Cancer

Co-founder Vanessa Risetto managed a health crisis while helping her telehealth nutrition startup, Culina Health (No. 564), bring in \$5.7 million in revenue last year. —As told to Brian Contreras

From the September 2025 issue.

I

In 2020, Vanessa Risetto co-founded the telehealth nutrition startup Culina Health. But Risetto, now 46, became a patient herself after she learned she had breast cancer. Her health crisis arose at an especially challenging time, as she was in the process of raising capital for the company.

In November 2019, I got coffee near NYU with my co-founder, Tamar Samuels. She said, “It’s so lonely having my own private practice. I take insurance and I have offices in the city, and you take insurance and you have offices in Hoboken—let’s join up.”

We did everything ourselves. We called all of our doctor friends and said, “Hey, we have a private practice. Can you send your patients to us?” People started to refer to us at a very high velocity.

The VCs started calling. One was Charlie O’Donnell, whose Brooklyn Bridge Ventures wrote us a check for \$300,000 and co-led the seed round. From there, we were able to get VC firms Healthworx and Rethink Impact and a cascade of other investors on board.

Then, in May 2023, I was told I had breast cancer. I didn’t know how sick I was, and I had to make sure these people were still going to invest in me. I got into surgery pretty fast, and they said, “This is Stage 1A. We can do a lot of things.”

I did have one potential investor that was going to wire me money, but the day after I told them I was actively undergoing chemotherapy, they said, “Oh, we can’t get it over the line. We’re not giving you money.” But overall, everybody was really supportive.

I told my oncologist, “I’m on TV. I have investors. I cannot present as sick.” She said, “OK, we’ll do longer chemo, more targeted. You won’t lose your hair. It’ll be a longer stretch, but this is the best that we can do. We have options because you’re very early stage.” In hindsight, I should not have worked. I should have said, “I’m gonna just chill out.” But I didn’t do that because I felt such a responsibility to the team.

After my first surgery, I was told, “OK, it didn’t move. It’s not in the lymph nodes. We got it.” But then I had to have the second surgery because the pathologist wanted wider margins.

Tamar was living in Florida, but flew in when she could to take me to radiation. Robyn Ziembra, who has been my best friend since high school and was VP of operations at the time, took me to all my surgeries and chemo treatments.

Meanwhile, at Culina, we did a \$2.7 million simple agreement for future equity extension in July 2023. We had the money



committed from Collab Capital, and the day of my second surgery—because their process is that you meet on a Zoom with all of them and their lawyers for this celebratory thing—I was literally in a hospital gown.

We started raising our Series A while I was in chemo, which felt like a distraction. I had to do seven investor calls a day, because I had to get money into this business. I was done with chemo in April of last year and could really focus on just raising money. Late last year, we closed the \$7.9 million Series A.

Fourteen rounds of chemo, two surgeries, and 20 rounds of radiation later, here I am.

**Inc.5000**  
COMPANY  
SPOTLIGHTN°629  
2025 Ranking663%  
3-Year Growth\$2M+  
2-Year Revenue15  
Employees

# This Law Firm Is Built on a Foundation of Faith and Perseverance

The CEO of the Law Office of Deidra N. Haynes LLC pushed through adversity to create a multimillion-dollar business.

**A**nyone who loves a good comeback will enjoy Indianapolis family law attorney Deidra Haynes's story. Her early years were difficult: Haynes didn't meet her biological father until she was 41. However, his absence was in the subtext of every chapter of her life. She says the void left by his absence led to rebellion, teen motherhood, and even homelessness. Yet Haynes says the pain that once threatened her future became the driving force behind her advocacy for fathers who want to be present in their children's lives.

Between her senior year in high school and when she completed an associate's degree, Haynes went through two brief periods of homelessness and raised two children as a single mother. She met these challenges with strength and resolve, ultimately earning a bachelor's degree from Illinois State University and a law degree from Indiana University School of Law—Indianapolis.

Today, Haynes runs the Law Office of Deidra N. Haynes, a multimillion-dollar firm focused on family law and personal injury law. She differentiates her firm, in part, with a concentration in fathers' rights. The firm represents fathers in 95 percent of its family law cases. Some might see that as an ironic turn of events.

She considers it divine orchestration.

## A STRATEGIC PIVOT

Haynes began her career in employment law at one of Indiana's largest corporate firms. Then, a junior partner told her she didn't belong. So, she resigned, pivoted, and walked away from corporate law. Hoping faith-based work would offer a deeper sense of

purpose, she enrolled in theology school. But after two years, she found herself disillusioned by that experience, too. So she returned to the law profession, determined to practice it in a way that fulfilled her spiritual mission to do good.

The comeback wasn't easy. She was financially destitute, working at a Speedway gas station and Comcast to save enough to open her own office. Plus, after two years away from practicing law, she'd lost her courtroom rhythm. Determined to rebuild, she spent mornings observing criminal cases in Indiana's Hamilton County, where she noticed a glaring gap: "I started seeing people who looked like me but were not represented by people who looked like me," she says.

Haynes wrote to the county court administrator requesting a part-time criminal defense contract. The \$30,000 contract helped launch her practice, and a second contract in Marion County gave her experience in child support cases. Soon fathers began hiring her privately for custody and parenting disputes.

Each case stirred something personal: "I wish my dad knocked on some lawyer's door and said, 'Let me find out how to fight for Deidra,'" Haynes says. That longing became her purpose.

## THE \$75,000 BET

To help more fathers, Haynes needed to scale her firm. With revenue at \$120,000, she made a bold move, investing \$75,000 in business coaching. She was determined to bet on herself.

"That was mustard-seed faith," Haynes says. "I had to believe the return would come, even if I couldn't see it yet."

Today, with a staff of 15 employees, Haynes credits her success to relentless learning and execution. "If you want to grow, be a student and apply what your coaches teach," she says. "If you don't, you'll waste time reinventing the wheel."

From fatherless child to champion for fathers, Haynes believes her journey proves that painful beginnings can be transformed into powerful purpose.



→ Deidra Haynes, CEO, Law Office of Deidra N. Haynes

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**Inc.**  
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# Way to grow, small businesses.



**On behalf of everyone at Salesforce,  
congratulations to the honorees of the Inc. 5000  
list on a truly remarkable achievement!**

We know that running a small business is a huge undertaking. Securing your spot on this list proves your incredible hard work and dedication to growing your business in a wildly competitive, ever-evolving marketplace. You understand better than most how crucial it is to keep that momentum going, and fast.

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Judging from your trajectories so far, this is only the beginning.



Kris Billmaier,  
EVP and GM of Sales Cloud and  
Growth Products at Salesforce

salesforce

for Small Business

# Hats off! (Because you're wearing 10 of them.)



Kudos to the growing businesses that made the Inc. 5000 list. We know how hard you work; that's why we work so hard to help you keep growing. With smarter AI, connected data, and empowered employees, there's no telling how far you'll go. Knowing you, though? Sky's the limit.

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# How a Huge Deal With Coca-Cola Springboarded My AI Avatar Company to the Top

**Akool has surfed the AI tsunami all the way to the top spot on the 2025 Inc. 5000 list. —As told to Ben Sherry**

*From the September 2025 issue.*

# J

Jeff Lu spends his days working in the shadows of giants. His company, Akool, operates out of the same building that Mark Zuckerberg first grew Facebook in back in 2005. Like Zuck, Lu has big plans. Since he founded Akool in 2020, he's shaped it into a nearly \$40 million business by providing companies with AI-powered avatars—lifelike digital characters that help with everything from customer support to corporate education. Lu, 35, has spent his entire adult life working at the intersection of AI and video. After starting his career as a Microsoft intern, he earned his PhD from the University of Illinois. In 2018, he scored a job at Apple, where he focused on the iPhone's Face ID scanning tech. He then moved to Google Cloud to work on its video processing services—but felt too constrained to stay. Leaving Google and striking out on his own was a shrewd move. Akool has surfed the AI tsunami all the way to the top spot on the 2025 Inc. 5000 list. Here's how.

I had to quit Google. At the time, they were very conservative about generative AI.

They didn't want us working on any products where they couldn't control the outcomes. Now it's a different story at Google, but I didn't want to follow those rules. I started Akool as a side hustle, making just over \$100,000 in 2021, my second year in business. We pretty quickly grew to 10 employees.

We had very little money, so we had to be strategic about how we built our tech stack. We used eight GPUs to train specialized AI video models, which we call human models, in just a few weeks. Our human models generate digital avatars and give them realistic behaviors.

Early in 2023, we landed the client that changed the trajectory of the company: Coca-Cola. We didn't even know the identity of the client at first—all we knew from a marketing agency was that a big-name brand was looking for a partner with expertise in AI face swapping, and they had benchmarked every tool on the market. Coca-Cola told us our tech was significantly better than the others', and that they wanted to work with us.

We turned our experience with Coca-Cola into a case study and included it in a massive email campaign to marketing agencies. We realized we could sell our tech to the agencies, and the agencies could cross-sell the tech to their clients

while pitching campaigns. The marketing agency community is small, so when people see a large, successful campaign, word of mouth spreads quickly. That's when business really started to pick up.

Our live video capabilities are way ahead of those of competitors like Google, OpenAI, and Adobe, and I don't think they'll be entering this space in a major way soon. Still, the market is very competitive, and our main focus now is to continue growing so we can compete with these larger players and win the industry. For instance, we now have the cash flow to build larger AI models, including our own video foundation and voice-generation models, which will make our avatars even more realistic. The goal for everyone in this space is to create videos that people can't tell apart from real life.



Akool, which Jeff Lu started just five years ago, powers lifelike avatar creation.

**Inc. 5000**  
COMPANY  
SPOTLIGHT

**N°2301**  
2025 Ranking

**185%**  
3-Year  
Growth

**2X**  
Inc. 5000  
Honoree

**2016**  
Year  
Founded



# An Industry Pioneer Moves From Fast-Growing Startup to Lasting Market Leader

Attentive, an innovative company with an economical approach to workplace wellness, has a smart playbook for sustaining its impressive growth trajectory.

**A** pioneering spirit is part of Attentive's DNA. The company began when CEO David Chaviers designed a model that allows businesses to offer a suite of employee well-being services while increasing the business's bottom line. The approach works by generating savings when employees participate and using those dollars to fund the program. Chaviers's goal was to help companies better support their employee wellness, despite rising health care costs. The model proved to be so effective that competitors soon followed, says Allison Wendelberger, senior vice president of innovation. "We created our own competition, but that's what happens. If there is a good idea out there, of course people will capitalize on it."

Those competitors will have their work cut out for them. Attentive has now earned its second Inc. 5000 recognition and is preparing for an even bigger 2026. Growth can be challenging, but the team is confident. "First, we pioneered the concept. Now, we are pioneering how we scale and ensuring we can maintain the growth we are experiencing," Wendelberger explains.

## INFRASTRUCTURE THAT FUELS GROWTH

"Moving from a bold idea to a sustainable system is what separates a flash-in-the-pan startup from a lasting company," says company president Josh Kirkland. To build that system, he has been investing in people, processes, and proprietary solutions designed to deliver efficient execution. As Wendelberger explains, the company is "tech-driven, but people-powered." Attentive delivers its solution through a nationwide distribution network, including insurance brokers. These partners are successfully growing their businesses with Attentive's program—cementing the company's reputation as a key revenue driver. "We provide a solution that empowers our partners to grow and deliver consistent value to their clients, backed by exceptional service," Kirkland says.



→ Josh Kirkland, president, Attentive

## CONSUMER-CENTRIC INNOVATION

However, technology alone isn't enough to support Attentive's expanding reseller network. Equally important is the company's commitment to maintaining a best-in-class services portfolio to align with employee needs. A key focus is mental health, where Attentive offers resources for the entire family. By keeping its offerings both relevant and customer-centric, Attentive ensures that resellers and employers can confidently deliver solutions that matter most to today's workforce. "Scaling is about more than size. It's about improving the way we serve people while preparing for what's next," Wendelberger says.

"[Basketball coach] Pat Summitt used to remind her players that success is about more than reaching the top—it's about staying there," recalls Kirkland, whose family members were Summitt's friends during his childhood. "That lesson resonates with me. Attentive may be the pioneer in this space, but our responsibility now is to remain competitive and keep setting the standard for our industry."

GETATTENTIVE.COM

# How I Turned the Home Manicure Craze Into a \$4 Million Business

**Monique DiBenedetto's Polish Pops (No. 310) caught on "like wildfire" when she started a Facebook group. —As told to Bobbie Gossage**

*From the September 2025 issue.*

# N

Not everyone has the steady hand to be a home manicurist. Monique DiBenedetto, 36, learned that the hard way after having her first child, when she was struggling to paint her own nails at home. Spotting a business idea, she began researching alternatives to traditional nail polish. In 2020, when the pandemic closed nail salons and created a home manicure craze, DiBenedetto launched Polish Pops with her husband, Paolo, 35. The company makes nail polish wraps you can apply easily like a sticker—no painting required. Polish Pops now has some 200 nail wrap designs priced between \$9 and \$16 per set. Despite a few early setbacks, the company generated over \$4 million in revenue last year, driven primarily by Meta ads, a die-hard Facebook community with more than 27,000 members, and the word-of-mouth marketing that comes with all the compliments of “Nice nails.”

My husband and I were both working in tech full time when I got the idea for our product. Our first daughter was about 6 months old, and I was desperate for a cute

manicure but didn't want to go to the salon. I did some research, and the product already existed, but there was a lot to be desired. I looked for suppliers and got some samples.

Then Covid hit, and the salons closed. So we just went with it. We started the company with \$2,000 and spun up the business in about a month. We created a package with a Popsicle on it because I thought it was cute. We set up a website, got inventory, and told our friends and family about it. But then, it was kind of crickets.

So I said, “OK, let's figure out Facebook ads.” We had success with them right from the start. I quit my job, partly because I wanted to focus on Polish Pops, but I also wanted more time at home with our daughter. I worked on Polish Pops during her naptime and at night, and spent more time with her while she was little.

One of our most challenging moments as a business was at the end of 2021. We'd hired a team to rebrand us, to help take us to the next level. We put everything we earned into a new website and making our products more high-end. We launched a new line of gel Polish Pops and raised our prices by 50 percent or more.

It turned out that the customers we had initially acquired were more value-based, and a lot of them decided Polish Pops wasn't for them. There was also a huge learning curve for people with the new gel line. It just wasn't really received as the awesome product we thought it was going to be.

Around the same time, there were iOS privacy changes that impacted Facebook



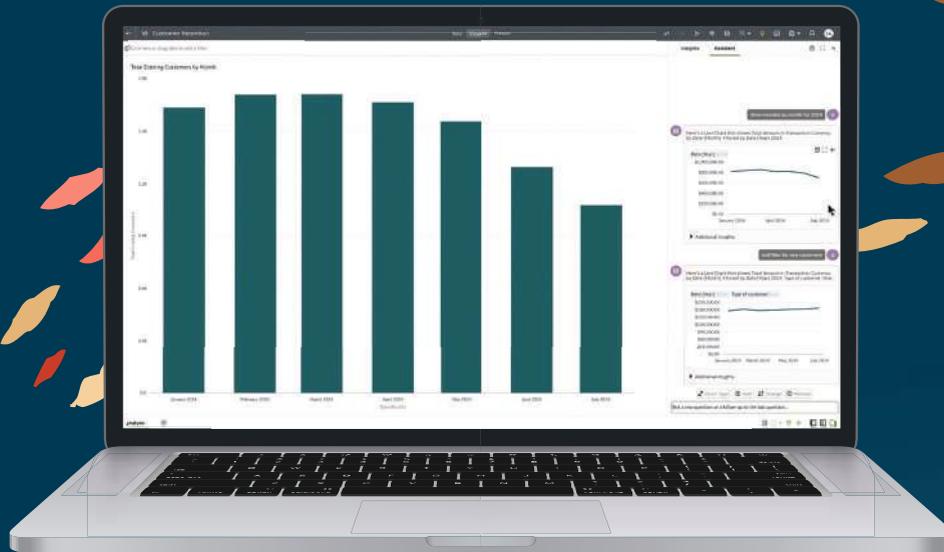
ads, and we just weren't reaching the customers we needed to reach anymore. We were like, do we keep trying? We don't want to give up, but we also don't want to lose any more money.

As a hail mary, I started a Facebook group. About 1,000 of our customers joined from the get-go, and everybody was so positive. This became a forum for us to do a lot of education for our gel line, which you cure underneath a UV light. It's made of real gel ingredients, and the manicures last a lot longer.

People started posting in the Facebook group, saying, “Oh, my gosh, I love these gels!” After struggling for months, the product just kind of caught on like wildfire. The gel Polish Pops are the majority of our business now, and that's all I wear.

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# Touchland Is Taking Self-Care to New Heights

With Touchland (No. 178), Andrea Lisbona Vives breathed new life into hand sanitizer and secured a \$700 million exit. —By Kevin J. Ryan

From the September 2025 issue.



Andrea Lisbona Vives was into hand sanitizer before it was popular. The Barcelona-born entrepreneur founded the personal care company Touchland in 2016, when only the germ-obsessed kept a bottle of hand sanitizer handy. Lisbona Vives, 39, felt strongly that reimagining the product could move it from an unceremonious bin in the pharmacy to prime shelf space in fashion and beauty retailers. She was right. Touchland hand sanitizers are now sold in stores including Sephora, Ulta Beauty, and Kohl's. The Miami-based brand is known for its sleekly designed spray bottles and formulations that contain moisturizer but don't leave hands feeling sticky.

Touchland benefited from a Covid bump, but maintained momentum post-pandemic. Annual revenue reached over \$100 million in 2024, having grown 2,200 percent since 2021. After launching a line of fragrances in January, Touchland was acquired in May by Church & Dwight, whose portfolio includes Arm & Hammer and OxiClean, for \$700 million. An earn-

out based on 2025 sales could bring the price to up to \$880 million. Inc. recently spoke with Lisbona Vives, who is staying on as CEO, to discuss the deal and how her company's culture helped drive its success.

## Did you always plan on selling one day?

I think we knew when we started the company that that would be the outcome. I always said that when it came time to find that home for Touchland, there would need to be a natural alignment in terms of culture, and it would have to be a partner that will give value to what we've built and be excited about helping us scale without forcing us to compromise on the essence of what made us special to begin with.

## What did your board of directors think about the sale?

We never got any pressure from our board about transacting. As more and more opportunities came knocking at our door, we debated whether we should try to go faster, but always came back to a simple question: If we do go faster and say yes to these amazing opportunities, could we actually execute at the level we want to? And over the past year, in being honest with ourselves, the answer we came to more often than not was no. Then, at one point, I had a call with one of my mentors. He said something to the effect of "Being a great founder is not just about knowing what you can do, but also about recognizing the point at which you need help." And I think that's the first

time I thought to myself, "If we're going to get to where we want to be and realize all the potential that lies in this business, I'm going to need help." And by help, I mean a great partner.

**Ultimately, you want to protect the legacy of your company.**

—Andrea Lisbona Vives,  
founder, Touchland

## How did the discussions with Church & Dwight start?

I knew Church & Dwight through another brand they had acquired. What stood out to us was their track record. They've taken personal care brands like Hero and Thera-Breath and helped them grow exponentially without compromising what made them special in the first place. For us, that helped seal the deal. When we met with them, there was an immediate alignment on the vision.

## What opportunities does this deal open up for Touchland?

We now have access to a robust global infrastructure that allows us to bring the brand to new markets. We're very active on

● *continued on page 19*

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°3316  
2025 Ranking75+  
Governments  
Served\$2M  
2024 Revenue12  
Employees

# The Climate Crisis Superhero— With a Local Focus

Kim Lundgren Associates (KLA) is empowering local governments—and communities—to tackle climate change.

**F**ires, floods, and other disasters are devastating communities with increasing frequency, creating billions of dollars in damage each year in events linked to climate change. The search for solutions often focuses on national or international responses. But Kim Lundgren knows that real, tangible change begins locally.

For more than a decade, climate action consulting firm Kim Lundgren Associates, Inc. (KLA) has helped cities, towns, and counties across the country address their community's emissions while preparing for the climate-related hazards they are already experiencing.

"We've got to cut our emissions in half by 2030 to avoid catastrophic climate change," Lundgren says. "Our team equips communities with the tools and resources to do so."

## WALKING THE TALK

Lundgren is a local climate action pioneer. She was one of the country's first municipal sustainability directors and developed Massachusetts's first climate action plan for Medford in 2001. That position launched Lundgren's career in this space and put her on the path to deliver her life's mission. Since then, the stakes have gotten higher.



→ Kim Lundgren, founder and CEO, Kim Lundgren Associates

"With costly and deadly impacts showing up in everyone's backyards, local government leaders do not have the luxury of ignoring climate change," she says. "As awareness grows, there is a greater sense of urgency, and people are turning to their local governments for accountability and action."

KLA has partnered with more than 75 local governments. Many of these—like San Antonio, Texas, KLA's very first client—are long-term partnerships that start with a robust planning project and then move to KLA's signature product, the Community Dashboard. The firm's Community Dashboards use storytelling to translate complex data into accessible information that drives community action. From tracking electric-vehicle registrations and heat-pump installations to sharing recycling and emissions impact metrics, these dashboards allow each community to see the results of their efforts.

## MAKING COMMUNITIES CLIMATE-STRONG

In addition to analytics, KLA helps clients build municipal capacity to ensure programs are sustainable long after the consultants leave. In Clark County, Nevada, KLA not only developed a climate action plan but also laid the foundation for long-term change: The county launched an office of sustainability, a regional climate collaborative, and a climate ambassador program that led to the most inclusive planning process in the county's history. Demonstrating their laser focus on high-impact solutions, KLA worked with Danvers, Massachusetts, on a targeted marketing campaign that saw a 300 percent increase in heat-pump rebate program participation.

KLA has proven that local governments can become climate action leaders with the right guidance, tools, and vision. By working with local leaders, implementing effective plans, and building capacity, KLA turns ambition into results, one community at a time.

"We're on a mission to save humanity and leave a stronger, healthier world for future generations," Lundgren says.

[KIMLUNDGRENASSOCIATES.COM](https://www.kimlundgrenassociates.com)



# All the benefits of Uber reimagined for business

Small steps, big impact

Learn more



Uber for Business

• continued from page 16



**GERM OF AN IDEA**  
Andrea Lisbona Vives spent two years formulating Touchland's hand sanitizer, which is liquid-based rather than a gel.

**Your company has 15 employees. How concerned were you that the acquisition would change the culture you've built?**

It's an egoless culture and it's all about what's best for the brand. With Church & Dwight, we were very intentional in evaluating not just the operational fit, but also the shared values. What gave me confidence is that they have a long history of letting founder-led brands thrive while giving them the tools to grow. Their team knew this was key for me, and they went to great lengths to provide comfort that they were not looking to change our DNA, but rather were excited to partner because of it.

**Do you ever pause and reflect on how remarkable it is to sell a company you built from nothing for \$700 million?**

It's an incredible accomplishment for the brand and for the people who really believed in us. When we started, there was always skepticism around the category we were entering. I've been inspired by many entrepreneurs before me who have done incredible things against the odds. Hopefully, Touchland one day will become that inspiration for future generations.

**What's your best advice for founders who hope to have an exit one day?**

For every founder who's put in their sweat and tears and hard work, there's no better feeling than finding the right partner. Ultimately, you want to protect the legacy of your company, and you want to make sure it's in the right hands. So don't rush it. And don't build your company for the outcome, build it for the process. When you build an incredible brand, success does come.

social media, and we have people across the world asking us to come to their country. Our launches in Canada and Dubai earlier this year have been successful—in Dubai, we were given a window display in the number-one Sephora store in the world. It's a dream come true. So, having seen what we've done with these two international markets, it's extremely exciting.

**What memories stick out from the day the deal became official?**

It was very emotional. I'm not going to say I didn't shed a tear, because it's a very important moment for a founder—you pour your life into this and want to make sure it goes into the right hands. When you feel like you've made the right decision, it's the most amazing feeling in the world.



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2025 Ranking\$2M+  
2024 Revenue27  
Employees11M  
Lives Impacted**AEROBODIES**

# The Race to Deliver Workplace Wellness Solutions

Health, wellness, and process improvement firm Aerobodies is the epitome of resilience, pivoting, and thriving through four economic downturns during its quarter-century history.

**F**ormer collegiate sprinter Fran Dean-Bishop began her professional career in sales, quickly distinguishing herself as a top performer. Yet, almost as quickly as she started, the pace led to early career burnout.

Work-life balance had not yet emerged as a mainstream concept in the 1990s, but Dean-Bishop saw the challenge. Then, she recognized it as a business opportunity.

## PERSONAL TRAINING PIONEER

Working out regularly at the gym, both to stay in shape and maintain her mental health, Dean-Bishop began to notice former track-and-field colleagues offering private coaching. She jumped into personal training, and by 1997, had devoted herself to Aerobodies full-time.

Aerobodies was initially a fitness-focused venture. However, when Dean-Bishop's clients began requesting onsite fitness training for employees and co-workers, Aerobodies transitioned into a corporate wellness firm, offering health and wellness program management, workplace design, and business process improvement.

## ADAPTING DURING DOWNTURNS

The dot-com bust a few years later, along with a suggestion from a client, pushed Dean-Bishop to build proprietary online fitness programs for clients. The Financial Industry Regulating Authority (FINRA) was an early fitness app user.

Aerobodies was growing steadily until it hit yet another bump in the road: the Great Recession of 2008. Dean-Bishop recognized she needed to secure longer-term clients "for more stability and dependability" and decided to focus on the federal government.

"The government typically signs a one-year contract with four-year options," she says, versus the year-to-year contract renewals common in the commercial and private sectors. Landing

the firm's first federal client, the U.S. Department of Veterans Affairs (VA) took 18 months, including learning government contracting lingo, attending government contracting conferences, and finding potential government clients.

Today, 80 percent of the firm's clients are federal agencies, including the Federal Aviation Administration (FAA), the Securities and Exchange Commission (SEC), and the Department of State, to name a few.

## BUILDING A SUSTAINABLE CULTURE

With the commitment of years-long contracts, Dean-Bishop recognized the need to fortify Aerobodies's corporate culture. "No matter how fantastic a pipeline of clients you have ... if you don't have the right people in the right seats going in the right direction, then you can't win consistently," she says.

Employee retention had long hovered at around 45 percent, but as the company clarified the kind of work it wanted to engage in and the kind of people best suited for those roles, retention soared. Today, at 88 percent, "employees beg to stay here. They don't want to leave," she says.

Which is good news, since Aerobodies clients also rarely leave. Average client tenure is seven years, far longer than the standard contract term.

Always looking ahead to what's around the corner, Dean-Bishop says, "Our next horizon is artificial intelligence (AI)—not someday, but now, to fuel client well-being and productivity."



→ Fran Dean-Bishop, CEO, Aerobodies

# How a 2022 Law Spurred Growth for This HR Firm Focused on Women

Sheila Dukas-Janakos's Healthy Horizons (No. 2,498) provides the space working mothers need to pump in the office. —By Kimberly Weisul

From the September 2025 issue.

S

Sheila Dukas-Janakos remembers seeing the cigarette smoke stream out from under the closed door of her boss's office. It was 1988, and she had just returned to her job at the San Mateo County Health Department after being on maternity leave. Because she was breastfeeding, she needed to pump every few hours while she was away from her baby. At the time, there was no regulation that required her employer to make accommodations for nursing mothers. So when Janakos requested time off to pump, she instead got back-to-back field assignments, making it even harder for her to express milk for her baby.

"He got time off to smoke, but no one would think of giving you time off to pump, because that was a selfish thing to do," she recalls. "Everyone was unforgiving."

After the birth of her second child, Janakos had a job, a 2-year old, an infant, and near-constant mastitis. She was in graduate school, getting her master's degree in public health education. This is not the point at

which most people decide to become an entrepreneur, but Janakos was stubborn. And she did not want other parents to have the same experience she'd had.

Her company, Healthy Horizons Breast-feeding Centers, was founded in 1991. It first operated out of her home in the Bay Area, and later out of a small space in an antique store Janakos ran with her then-husband. Today, Healthy Horizons works with more than 50 employers across the country to support employees who have recently returned to work and are lactating. The company designs and furnishes lactation rooms, ensuring they're stocked with everything a nursing mom could need, such as dedicated refrigerators, storage bags for milk, and snacks and water.

Healthy Horizons also sources and maintains hospital-grade pumps for its lactation rooms, which spares employees from schlepping a pump to and from work every day. This also makes pumping easier and more sustainable, by cutting pumping time in half, keeping a mom's milk supply healthy, and reducing the chances of mastitis. Healthy Horizons will also ship milk for moms who are traveling.

"Early on, we had to educate people on why pumping was necessary," says Janakos, 61. "Now more people understand the challenges of pumping, and why it's important. People come to the conversation knowing what a lactation room is and knowing what they want for their workplace. It's so much nicer."

**People come to the conversation knowing what a lactation room is and knowing what they want for their workplace.**

**It's so much nicer.**

—Sheila Dukas-Janakos, founder, Healthy Horizons

Back at that first office in the antique store, Janakos offered consulting for new moms, and, crucially, access to hospital-grade pumps. There were very few available in her county, and she rented hers out. When personal pumps first became available in 1995, they could be sold only through so-called rental stations, and Janakos started selling them. "I couldn't keep them in stock," she says. Then she found 13 other women in the Bay Area to open up rental stations and sell them for her, in exchange for an hourly wage and commission.

Referrals from employees landed Healthy Horizons its first corporate clients, such as Gymboree and Dow Corning, in 2003. Janakos suddenly needed employees to maintain lactation rooms in multiple locations. She recruited doulas, her adult children, and even their significant others. "It became a joke," she says. "Each time my son dated

someone new, he was like, ‘Mom, please don’t hire her.’” One of those girlfriends became Janakos’s daughter-in-law, earned a certification as a lactation consultant, and still works at Healthy Horizons. After getting her MBA, Janakos’s daughter Cassi joined the company as COO.

Healthy Horizons started to scale after Janakos attended an accelerator program at Stanford in 2015, and growth burned even hotter when Congress passed the Providing Urgent Maternal Protections, or PUMP, for Nursing Mothers Act in 2022. Time and private space for employees to pump became more than just a perk—it was federal law.

But continued success has meant catering to employees with ever more complicated needs. The homey facilities that can be set

up in an office building aren’t generally available to those who move around for work or work outdoors. At one dairy farm, for example, Healthy Horizons provides wearable breast pumps, enabling workers to pump while they’re in the field, managing inventory, or driving.

At Pacific Gas & Electric, Healthy Horizons manages about 70 lactation rooms in different facilities. But thousands of PG&E workers are in the field, working on power lines and other equipment. “In the beginning, we would allow co-workers to drive to the nearest facility,” says April Charles, a senior benefits administration analyst at PG&E. “But if they’re in a remote area, they could be driving an hour to get to a facility with a designated lactation room.

That wasn’t sustainable.”

Healthy Horizons suggested that PG&E offer new moms a travel kit that allows them to pump from a repair truck. It has privacy screens and an adapter so that the pump can be plugged into the vehicle’s cigarette lighter. It also has a cooler for milk and a thermometer, so moms can be confident their milk is being stored properly. And PG&E provides wipes and access to water to clean their pumping equipment.

Janakos continues to see opportunities for expansion. She points to a \$50 billion total addressable market, based on the existence of 7.3 million firms in the U.S. and Canada that have workers who potentially need spaces to express milk. Healthy Horizons started a new-parent gift program in 2017, and now sends out about 1,500 gift boxes on behalf of its corporate clients each month. Ranging in price from \$100 to \$135, they’re stocked with high-end baby supplies. About a year ago, the company launched gift boxes for parents adopting older kids. It is also looking to offer services in Europe and Latin America, where it provides breast milk shipping services and lactation consultations for parents returning to work.

And, importantly, Healthy Horizons offers education to spouses, partners, colleagues, and bosses of new moms, so they can understand what new moms need and why laws such as the PUMP Act are in place.

“I do see a lot of employers telling only pregnant workers about this, and that sets them up for failure,” says Lee. “It’s supervisors and co-workers who will make or break this in practice. The more you educate the community, the more you build a culture that understands why this is important, and that the entire company stands behind it.”



Shelia  
Dukas-Janakos  
(left) and  
Cassi Janakos



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# How This Founder Piloted His Aviation Business to Success

Roberto Guerrieri and Stuart Illian's Bluetail (No. 309) targets owner-operators with three or more planes. —By Will Swarts

I

*In the era of modern flight, planes are kept aloft by physics, pilots, and lots of paperwork. Roberto Guerrieri, a veteran of Apple and Hewlett-Packard, was seeking a new entrepreneurial challenge when he teamed up with a former colleague from Cupertino, Stuart Illian. In 2019, they launched Bluetail, which digitizes and stores aircraft records, bringing software-as-a-service to the skies. He hasn't gotten his pilot's license, unlike Illian, but Guerrieri, 62, channels a founder's enthusiasm when speaking about Bluetail's trajectory. In 2021, the company notched revenue of \$182,600, which has since grown over 12-fold to just under \$2.5 million last year. Here's how Bluetail got off the ground.*

Stuart and I had worked together for about 10 years at Apple and stayed in touch. He came to me six years ago and said, "I found a hole in the market." At that time, aircraft maintenance records—and there are a lot of them, all required by the FAA—were 80 percent on paper. There are about 400,000 planes in general aviation worldwide, and about half of them are in the U.S. So we

talked about creating a SaaS platform to help with efficiencies on audits, conforming to FAA requirements, and inspections.

With aircraft documentation, it's either safe to fly or it's not. There's no gray area. Getting all of that documentation done can take weeks and weeks and weeks, and that's going to keep an aircraft on the ground during that time. We take paper and make it interactive, so people can make better and faster decisions.

Initially, we thought we could scan an owner's records by having them box stuff up and take it to a really secure local scanning center. Then we realized the owners weren't going to box stuff up, so we would have to go to them. For our first client, we got in the car and took a road trip to San Diego, and we scanned the records for a Citation 525, a corporate jet, which is what we specialize in, along with some turboprop planes and helicopters.

We went through all the documentation, and we just started scanning and organizing as we went. We learned how long it would take, did some efficiency studies, and realized if we were going to scale this thing, we would really have to build out a network of people who could do this onsite.

In a startup, you've got to pivot quite a bit, and that was one of our pivots. It was hard to perfect the scanning process, but we are close to it. Now we have a special scanning kit and doing one aircraft can take a day if the owner is organized. If not, it can take two, two-and-a-half days. If an operator has 100 aircraft, it can take several weeks.

Now, lots of corporate flight departments use us for security, compliance, and going all-digital. We've since added services beyond the original core set of required maintenance records, and we just expanded to Hong Kong and Australia.

We don't want to stop with aircraft. We want to do this for documentation of engines, parts, and airport properties. Our ultimate goal is for Bluetail to become the asset hub for aviation around the world.



Stuart Illian (left) and Roberto Guerrieri (right)

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COMPANY  
SPOTLIGHTN°766  
2025 Ranking548%  
3-Year Growth42  
Employees\$11.3M  
2024 Revenue

MDRNCAPITAL

# This Founder Created a One-Stop Retirement Planning Shop for People 55+

MDRN Capital is driven by a personal story and a smart, virtual approach to retirement planning.

Like many great founder stories, Aaron Cirksena's starts with a personal anecdote: After watching family members get bad financial advice in retirement, causing them to lose money and put their dreams on hold, he vowed to make a difference. Since graduating with a degree in economics from the University of Maryland, he has devoted his life to financial planning and helping people ease the anxiety that often comes with saving for retirement.

In the early days of building his business, Cirksena often hustled to get clients in the usual ways: conducting in-person seminars and workshops, building his independent financial advisory client base person by person. He rented out high-end space in downtown Annapolis, Maryland, for clients to talk through their financial needs.

## A NEW BUSINESS MODEL

But after he pivoted to remote contact during the pandemic—video-chat consultations and web-based marketing—clients preferred the new business model. He realized that he could not only lower his overhead costs, passing the rent savings on to clients through lower fees and comprehensive financial services, but he could also help more people by working remotely.

That meant expanding the individual adviser role and scaling up. In 2023, the founder and CEO rebranded his advisory to MDRN Capital, an all-virtual national company serving people ages 55 and older. Gone were the live marketing seminars, and in came a marketing funnel of educational financial planning videos leading to appointments with financial advisers.

## INCLUSIVE RETIREMENT PLANNING

Cirksena understands that retirement planning requires a holistic approach. "We are a one-stop shop for everything [our clients] need for retirement: Medicare planning, Social Security advising, investments, tax planning and filings, estate planning, and trusts," he says. The firm partners with experts in different states for these services, covering the cost.



→ Aaron Cirksena, founder and CEO, MDRN Capital

Even while providing these services, MDRN Capital is 30 to 40 percent less expensive than brick-and-mortar firms, he says. The firm also offers annuities and money market accounts with no client fees, reducing client costs.

Another advantage? Cirksena knows the value of listening to clients. Clients get upset paying fees when their accounts lose money, so MDRN freezes advisory fees if accounts are down for two consecutive quarters.

## HIGH GROWTH POTENTIAL

Since its post-pandemic rebranding, MDRN has hired 20 advisers. They often come from large financial institutions; MDRN trains them to work with its client base. "The mentorship portion is appealing, and advisers are happy to get qualified prospects setting up time to talk with them," Cirksena says.

"With 10,000 people retiring every day, many of whom have more than \$500,000, it's almost impossible to fill the financial-planning demand," he asserts. Clients like his virtual model and the personal attention. "When they see the level of difference of what we do, and the lower cost, they wish we existed sooner."

MDRNCAPITAL.COM

# How I Help Institutions Manage Hundreds of Billions of Dollars in Debt

**DebtBook (No. 252) helps clients manage debt on everything from drinking water to first-responder teams. —As told to Brian Contreras**

*From the September 2025 issue.*

# M

*Managing government debt is not exactly a sexy business, but Tyler Traudt will tell you there's money to be saved if you know where to look. As co-founder and CEO of the accounting software startup DebtBook, Traudt, 37, helps state and local agencies, universities, and nonprofits, which borrow hundreds of billions of dollars each year, analyze and improve their debt strategies. DebtBook generated over \$27 million in revenue in 2024, helping agencies, educational institutions, and municipalities understand their finances. With the Department of Government Efficiency (DOGE) making public spending the focus of national debate, the cultural headwinds are blowing in the fintech company's favor.*

When I applied for jobs out of college, I wanted to be in finance. My connections took me to public finance. I spent nine years helping state and local governments, transportation and power agencies, and health care and higher-education customers borrow money.

These organizations have really big needs. They've got to build dorms and stadiums. They've got to build infrastructure and hospitals and schools. When they need money, they borrow it, typically by way of bonds.

But many of these organizations have not modernized their internal financial systems; the information they need to inform that work is kept in spreadsheets and paper files. We have organizations in this country with billions of dollars of debt, and all of that information is being managed in a Microsoft database by somebody who might retire in a month. We felt we could build a software company that could help those organizations with their debt and modernize their financial infrastructure.

We launched our first product in February 2020. It was a major risk. My wife

was pregnant with our first child at the time; she was going to be a stay-at-home mom, but I went to zero income, so she had to keep working all the way through it. It was like jumping into the deep end and having to learn how to swim, but I felt a tremendous amount of conviction.

When Covid was initially disrupting all the work everybody around the world was doing, the treasurer of the University of North Carolina at Charlotte was asked by the board to provide visibility into the school's finances—like, “Tell me about all these different loans we have. Do we have financial flexibility?” They really couldn't answer the questions right away; they lacked visibility because of their spreadsheet-based systems. So they were one of the very early adopters of our debt management product.

The university used our software to look at all their debt and noticed that they had enough money to stop charging students a fee for the construction of a new health center earlier than planned. So rather than continue to charge students, they proactively eliminated the project fee. We were able to give them visibility, and bang: They saved students \$600,000.

I think those kinds of stories exist absolutely everywhere, across all the things we're doing: how much you're paying for your water, how much you're paying in taxes for greenways or public safety. In higher education, in particular, there is an increased demand for our products as

**Amid the rise of DOGE,  
it's a conversation  
everybody's having:  
“How efficient  
are we? Can we be  
more efficient?”**

—Tyler Traudt,  
founder, DebtBook

many finance teams look to improve and have more control over how they operate. A number of for-profit businesses have come to us too, and we certainly won't turn them down.

A lot of our clients also experienced tremendous turnover during Covid. Many of them hadn't updated their systems and had people who'd done things one way for a really long time who were now all leaving. They were struggling to recruit and replace. The Great Resignation was a significant factor in our early growth across most of our customer segments.

Amid the rise of DOGE, it's a conversation everybody's having: "How efficient are we? Can we be more efficient?" In many states, they're taking a look at the work happening at the federal level and setting up their own DOGE programs. I believe that's starting to filter down to the local level, too. Now the small-town council member might say, "Are we thinking about efficiency? Are we evaluating all of our spend?"

There's more focus now on government efficiency than there's ever been in my professional career. And if our customers—the

CFOs and CEOs and city managers, the mayors, the elected officials, the boards—are interested in better understanding how they spend their money, then they should have software that gives them that transparency.

UNC Charlotte is a perfect example. Would they have seen that if they hadn't had a system to help them visualize it? Every college, hospital, state agency, transit system, city, county, and school district could improve its financial performance—and since all of us are their customers, we would all benefit if they had modern software and tools.



Tyler Traudt



**Inc.  
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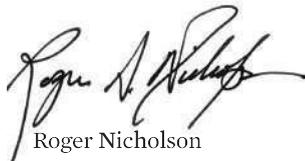
As a presenting sponsor and Inc. Power Partner, Insperty is excited to welcome you to the 2025 Inc. 5000 Conference.

This year, Insperty partnered with Inc. on its annual CEO Survey, and we uncovered many insights that helped us understand why your companies perform the way they do. And here's the thing— it all comes down to your people. We look forward to sharing the survey highlights with you on the mainstage.

Our team is also thrilled to give back together as we co-host a charity activity benefiting local nonprofit, Wesley Community Center. Visit Insperty's booth in the marketplace to learn about this incredible organization and assemble donation kits for new moms, students, and youth.

We can't wait to congratulate you in-person and help you discover how Insperty's optimal blend of premium HR service and technology can support your company's continued success.

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3-Year Growth16  
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WEALTH MANAGEMENT

# This Founder Lives by a Simple Mantra: Simple Scales, Fancy Fails

Bright Lake Wealth Management grew by saying “no” to distractions and “yes” to focus, doing fewer things, but doing them better.

**W**hen Ted Thatcher launched Bright Lake Wealth Management, he was the entire business. “I was sales; I was marketing, operations, delivery—everything,” he says. Clients got direct access to the founder, and the firm’s promise hinged on personal service.

But growth demands change. For Thatcher, scaling meant focusing deeply, even ruthlessly, and delegating.

“At some point, the founder has to let go. You can’t do all things for all people and still provide great service,” he says.

Thatcher knew that growth wasn’t going to come from layering services or chasing every lead. Instead, the company needed focus, great talent, and an exceptional client experience. To achieve those goals, he would need to build systems, document standards, and invest in training. Thatcher trademarked his planning process, which he named “Launch Your Retirement Blueprint,” giving every adviser a shared framework rooted in the five pillars of financial planning.

## RUTHLESS PRIORITIZATION

Like many entrepreneurs, Thatcher started out by saying yes to everything. But while that strategy helped him grow initially, being bogged down in every decision and task became a hindrance as the business got bigger.

“By 2021, we had a monster list of things we were trying to implement. All good ideas—but way too many,” he says. The shift came when the team stopped calling the list a strategy and started treating it as a list of priorities. One by one, they ranked the initiatives. Then they picked the most impactful one and shelved the rest. That shift brought clarity and momentum. They could continue to complete projects because their team was equipped with clarity.

To prioritize, they used a decision matrix based on impact, confidence, and alignment with long-term goals. The team questioned everything from whether the demand will help them move toward goals, fit within their capacity, or deliver return on investment before committing to something new.

## THE POWER OF ‘NO’

Since then, saying “no” to some requests and tasks has become an important part of the firm’s growth journey. That included turning away clients who wanted to day-trade or chase hot stocks. “We’re not built for that,” Thatcher says. “Our planning starts with long-term goals and works backward.”

Thatcher also decided not to open another office in northern California. “It looked strategic, but it would have stretched our team too thin at a time when we needed to go deeper, not wider,” he recalls.

In an industry obsessed with dashboards, spreadsheets, and new offerings, Thatcher’s approach to simplicity is almost radical.

“Some people say, ‘Complexity fails; simplicity scales.’ I like, ‘Simple scales; fancy fails,’” he says. Business will always try to get more complicated, he adds. The discipline lies in resisting that pull and instead focusing on enhancing customer experience.

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# How I Found My Second Calling in the Security Business

In 2024, Pace Protection (No. 269) brought in nearly \$4 million in revenue. —As told to Nick Hawkins

From the September 2025 issue.

I

In 2012, Shaun Pace, 34, moved to Louisville to train as a minister. When Pace and his wife began planning a family, he realized that earning little to no income from the ministry wasn't going to cut it. Two years later, he landed a temporary position as a customer service representative at the security company Sonitrol. By 2021, Pace was a general manager and had an offer for a million-dollar stake in the company. Instead, he followed his heart to San Antonio, where he founded his own security company, Pace Protection. Pace offers a wide range of services, installing everything from fencing and gates to alarm systems and AI cameras. In 2024, the 25-employee business brought in nearly \$4 million in revenue.

In 2021, I started Pace Protection in a barn with \$100,000—which was my entire life savings. Because I didn't have an established business history of my own, I couldn't get a business loan. I really hate

saying this, but it's true: Especially if you belong to a minority group, you're going to have capital issues.

In the 90 days before we were operational, I built our SEO, lead-generation, and marketing systems. I bought computers, desks, and marketing materials. I built a website and purchased a company vehicle. Just setting the barn up was around \$10,000. I made our first hires—a salesperson, who is now our sales manager, and a technician. Once we got that first sale, that proof of concept, it was like, OK, we can do this.

Those early days were lean, and we had to get creative with our accounts receivable to keep the business moving forward. Instead of the industry-typical 90-day invoices, I would ask to be paid 70 percent up front and the rest after the project's completion. As a small business, we wanted our payment process to be very quick to help keep prices down. If clients are taking longer to pay, guess what you have to do? You have to raise your prices. Not because the service costs more, but because someone else takes longer to pay, and you need that money to float until the next project goes through.

What I didn't know at the time, and what turned out to be a blessing in disguise, was that private equity companies were coming in and gobbling up a lot of the security businesses in the area. So my

main competition in San Antonio became giant conglomerates, where you couldn't even get a real person on the phone. This presented a unique opportunity.

At Pace, we're big enough to service large corporations, but small enough that you can come and talk to me, the owner of the company. So we leaned into that white-glove service.

For example, people often don't service their cameras, letting them go down. Then you have an incident, but the camera has been down for months. So we created an obsolescence and upgrade guarantee that sets us apart. You pay a single installation fee and a flat monthly service fee, and we will keep your system serviced and upgraded.

**At Pace, we're big enough to service large corporations, but small enough that you can come and talk to me, the owner of the company.**

—Shaun Pace,  
founder, Pace Protection

Another way we outpace the competition is job time. It can take some companies weeks to complete a job—and your cameras are down the whole time. At Pace, our average service job time is 72 hours, and we offer 24-hour turnaround times for emergency service.

Some clients are skeptical of our claims and guarantees, but my standard has always been excellence. And I don't just say that. I'm more of a show-me-your-works kind of guy.

We recently did a presentation in the College Station area, where Texas A&M is located. The local school district was looking for a giant camera system to cover the campus. Another vendor told the district that its system would allow them to view the entire parking lot and zoom in and pick up license plates anywhere in the lot. I'm telling them, "No, you have to have a specialized camera to get license plates, and the ones that can get license plates, they can't see everything else. You have to pick and choose, or do both types of camera." So on my quote, I had about 40 more cameras for \$100,000 less than the competition.

They went with the other offer. About three months later, the IT director calls me and says, "Do you mind if I recommend you to the other school districts in your area? We ended up having to pay \$100,000 more to add cameras because they didn't do what they said they could."

I believe you can't fake caring and you can't cheat the process.

As for what's next? We're opening offices in Dallas, Austin, and Houston. We're already in New Mexico and are expanding to Arkansas, Oklahoma, and Louisiana next. Now I'm the one getting eight-figure offers from private equity groups to sell the business three or four times a week. But I'm in no rush to sell. For me, the goal is to be able to work with my five kids one day and make sure they have the head start I didn't.



Shaun Pace moved from the ministry to offer another kind of peace of mind.

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# How One Company Became the Behind-the-Scenes Backbone of Live-Event Ticketing

After two big acquisitions, Automatiq has created an end-to-end ticket reselling platform to help people sell events across multiple sites at once.

In 2013, while Peyton Manning weighed whether to sign with the Denver Broncos or San Francisco 49ers, Sam Sherman was working full-time in out-of-home media sales. His friends were buying and selling season tickets, hoping to profit if their teams made the playoffs. Sherman, anticipating Manning's move to Denver, called the team to see what tickets he could secure. When Manning signed, he bought as many tickets as he could.

Those ticket values soon soared, but StubHub prices shifted constantly, making it impossible for him to keep his pricing up. Resellers were relying on outdated systems, missing sales, and leaving money on the table. Sherman saw an opening. He developed an autopricer—software that adjusts listings in real time according to market demand.

That innovation changed how tickets were priced, but Sherman didn't stop there. "Autopricing was the entry point," says the CEO of Automatiq, the ticket-reselling technology company he launched in 2013. "The real opportunity was to solve the broader set of manual problems that resellers, marketplaces, and fans experience in live events."

## BUILDING TOWARD END-TO-END

The next piece was distribution. In 2020, Automatiq added Sync, a processing technology acquired in a pivotal merger with Seat Scouts, which enabled brokers to simulcast inventory across every major resale marketplace. Drew Gainor, Seat Scouts' founder, joined as chief product officer. While other tools existed, Sync's modern features stood out. Automatiq soon became the engine behind billions in ticket sales, with more than 50 percent of secondary market tickets powered by its platform.

In 2023, Automatiq acquired Lysted, opening access to season ticket holders and professional sellers. For the first time, anyone could list across every major exchange with high-grade pricing, data, and automation. Lysted grew from 1,000 customers



→ Sam Sherman, CEO, Automatiq

selling \$200 million a year to more than 15,000 customers and expects to sell more than \$1.3 billion in 2025.

## SCALE MEETS LEVERAGE

Automatiq's growth has widespread benefits. "Scale is just the starting point," Sherman says. "What matters is how we use it to create value for every stakeholder." For resellers, that means higher fulfillment rates, better insights, and more automation. For marketplaces, it's a steady flow of reliable supply. For fans, it's more inventory, transparency, and fairer pricing.

Recently, the company launched a business-to-business (B2B) marketplace, giving approved resellers a closed environment to buy wholesale inventory. "We're building the rails for live events globally," Sherman says. "If we do it right, fans won't even realize Automatiq is behind their purchases; but resellers, marketplaces, and the entire industry will feel the difference."

Sherman also invests heavily in employees. "We attract the best talent," he says. "What keeps them here is being part of the team and seeing the difference they're making."

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# How Going Broke Helped Me Build a Financial Wellness App

**Ashley M. Fox, founder of Empify (No. 145), is grateful to have lost her savings, because she can relate better to her clients. —As told to Kayla Webster**

*From the September 2025 issue.*

# A

Ashley M. Fox knows what it's like to rebuild after losing everything. In 2013, the then 25-year-old left her six-figure-salary job on Wall Street and took a trip through France and Italy before buckling down and launching her financial wellness company, Empify. Designed to democratize financial education, Fox's online learning platform provides tools and courses to individuals, schools, companies, and even prison systems. But she quickly discovered the many unexpected costs of running a business, and her \$30,000 in savings ran out. She didn't panic. Instead, she adopted the mindset of the wealthy clients she used to serve and felt empowered to make her financial dream a reality. Now 36, she's well on her way. In 2024, Empify generated \$8.1 million in annual revenue, with more than 300,000 subscriptions and sales of other services. The company's members have invested \$12 million through its financial wellness and investing app, but Fox says she is just getting started.

When I left my job as a private banking analyst at J.P. Morgan, I couldn't afford my apartment and had to move back to my

parents' house in Philadelphia. I slept on their couch because I did not want to train my mind to believe that I actually lived there. I knew it was just a starting point.

In New York, I lived a kind of rich, Wall Street lifestyle. I traveled to the south of France right after I quit my job. You know, if I could do it all again, I probably would not do that, to be more prepared for all the expenses that come up when you go into business. But at that point, I was not operating out of logic.

When you have a job, you know your paycheck is coming every two weeks. When you're a business owner, it's possible that check is not going to come for two months, or even longer. And I didn't know that. I had no reference. So in my mind, the money was going to keep coming, and I was going to be just like the rich clients I used to have. I think it was a combination of not knowing and following my heart.

I ended up living with my parents for two years, building my financial advisory business in Philly before launching the app. My first clients were the School District of Philadelphia and a charter school in the city. We created educational programs for younger students because financial wellness isn't usually taught in classrooms, and unless you come from money, you don't know how to handle it. I moved into my own place in 2016, and in 2017, Empify made money for the first time.

What I learned while working in finance is that wealthy people tend to view money in a different way, probably because of a belief system. Wealthy people believe they have power and believe they deserve

the money they want.

So, at Empify, we want people to think, "What would it look like if I carried myself like that?" What if tomorrow is a new day to create the life you want? The only person who has the power to do that is you. We have to change our belief system to shift the way we see ourselves and the role of money in our lives.

All 14 of my employees spend a lot of time trying to help people unlearn and then relearn a new way of life. We've worked with more than two million individuals across the app and our classes. Some members feel like they're too old to start building wealth, and I say to them, "Well, what if you live another 30 years? Technically, you're early." Even if you work to hit a goal, when you hit it halfway, you're better off than never having started at all and not getting to where you want to go. That is a mindset you have to create.



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# From Zero to a Billion: One Founder's Story

How Car Keys Express founder Mark Lanwehr created his own luck and became the “king of car keys.”

In 2002, when Mark Lanwehr started selling car keys online to earn enough to cover his bills, the term “side hustle” wasn’t part of the popular vernacular. He was struggling to pay his rent, and his student loans were in default. But after nearly four years of building what would become the company’s product database, he finally considered going all-in on launching a business.

“Working out of my bedroom, I remember the moment I considered asking friends to work with me. I thought, ‘Is selling car keys really what you

want to do with your life?’ If I asked someone to leave their job, I had to commit. That was when I made the choice,” he recalls.

Today, Car Keys Express has become a global leader in automotive key replacement and a proven industry disruptor by offering easy, inexpensive options. The company serves 8,000 businesses and hundreds of thousands of consumers across 3,000 North American cities. This year, the company surpassed \$1 billion in cumulative sales and earned its seventh Inc. 5000 honor.

↓  
Mark Lanwehr,  
founder, Car  
Keys Express



## A CULTURE OF SELF-RELIANCE

Six years after he started the business, Lanwehr bought a used van and offered key replacement services to car dealerships. For years, he criss-crossed the country, hiring a new technician when he could afford to. He stands by the benefits of bootstrapping. "It forced me to be disciplined and resourceful. As we grew, I didn't have to answer to investors, allowing me to take big risks and keep reinvesting profits into growth. That culture of self-reliance has carried us from side hustle to national brand while maintaining complete control."

Risk-taking is a key theme for Lanwehr. "Creativity gets you started, and a great team and consistency keep you in the game, but the willingness to repeatedly shoulder big risks has fueled much of our success," he says. Building the company "often felt like sitting at the same roulette table for 24 years, with the stakes climbing every year," he adds. Among his biggest mistakes? He wishes he'd sought mentorship sooner. He counsels entrepreneurs to seek advice and to change advisers as their businesses grow, to keep advice relevant.

## UPDATING A CHANGE-RESISTANT INDUSTRY

Early on, a pivotal strategic direction Lanwehr took was to invest in a research and development (R&D) team to create "universal key" technology—attractive to retailers looking to reduce their product counts. In 2010, Lanwehr committed to vertically integrating his supply chain by investing in after-market key versions, earning pricing advantages to dislodge competitors. Investments in R&D continued, creating an impressive list of industry-leading accomplishments. The company was a pioneer in offering car keys and remotes online. It was also an industry leader in mobile key service, universal car remotes and keys, as well as electronic car key recycling. The company even developed a groundbreaking car key vending machine and DIY key programmers. Car Keys Express now has agreements in place with AutoZone, Advance Auto Parts, Costco, Sam's Club, Lowe's, Home Depot, Target, and many others.

## OPPORTUNITY LIES IN SETTING EGO ASIDE

Lanwehr wasn't passionate about car keys when he started in the car key business. "I had an MBA with a concentration in entrepreneurship and experience as an entrepreneur, so I wasn't eager to enter the corporate world—but I was broke," he says. A



friend was selling cars and suggested that Lanwehr give it a try, too. At the time, however, he says he was young and shy and thought the job was "beneath him," quickly adding that that was "a notion I'm now embarrassed to admit."

"I became exposed to the world of car keys because I set my ego aside and took that job. My story proves that preparation, patience, and getting outside of your comfort zone can lead to what some call 'luck,'" he says.

## REVOLUTIONIZING KEY REPLACEMENT

With more than two decades of success, Lanwehr says Car Keys Express has more opportunities than ever. "We're bringing real change to an industry that actually touches everyone," he explains. "Every day, when humans leave home, they take three things: their phone, wallet, and keys," he says. Lanwehr says consumers have had few options for key replacement in decades in the \$6 billion car key replacement sector, but people carry his products with them nearly everywhere.

"We have unique, patented technologies that finally let consumers do it themselves," Lanwehr says. "We're now positioned to lead the democratization of car-key replacement worldwide."

CARKEYSEXPRESS.COM

↑  
A Car Keys Express employee making a key.

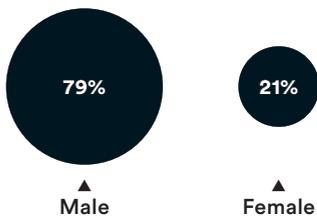
# Leaders

## ► By the Numbers

Data from 2025's Inc. 5000 CEO Survey

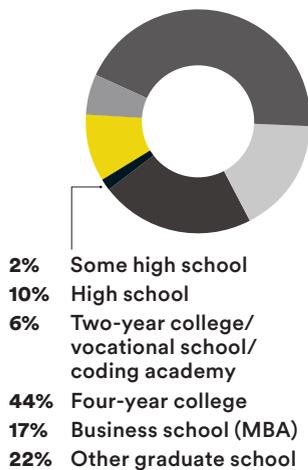
Inc. 5000 CEOs tend to be college-educated early risers with a net worth of over \$1 million. Most started their first business by the age of 34 and earned less than six figures upon launching.

### GENDER

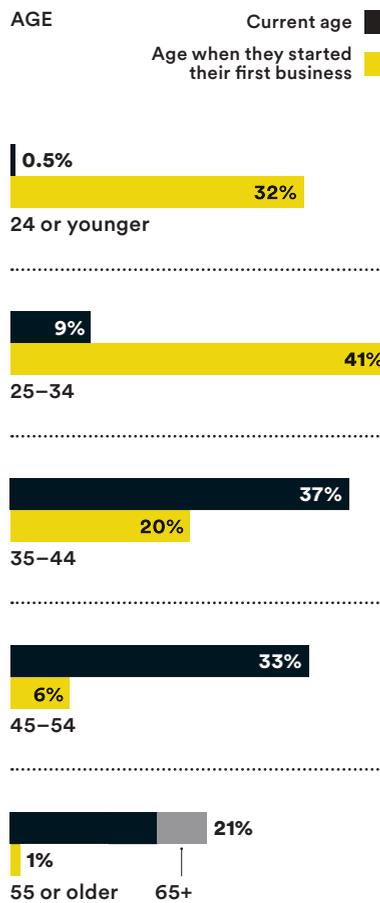


0.2% of respondents identified themselves as transgender or nonbinary.

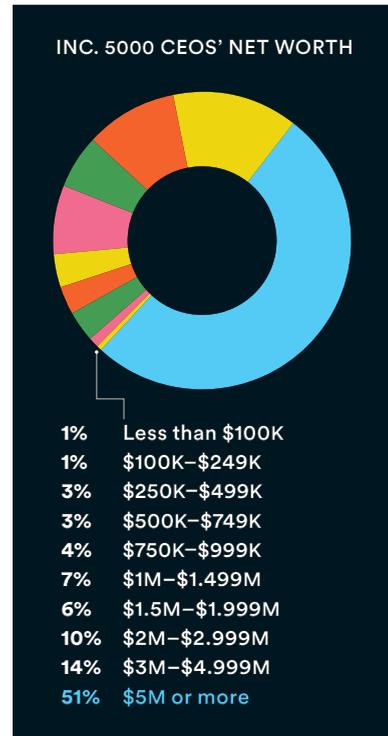
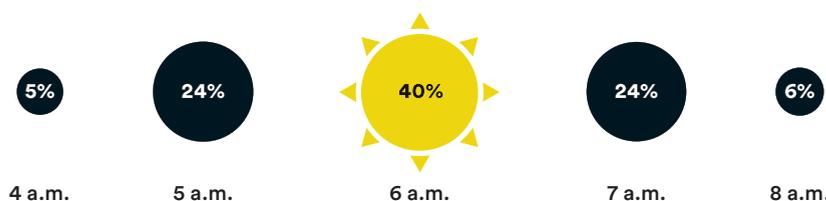
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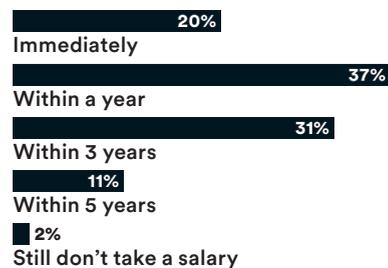
### AGE



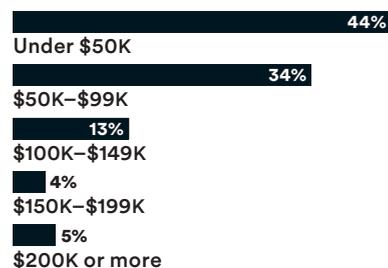
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