

2018 *profiles of success*

REWARD ACCOMPLISHMENT BOOMING PROVIDENCE LUCRATIVE EXECUTION OUTSTANDING WIN TRIUMPH ON TRACK ADVANCE THRIVING PRODUCTIVE ACKNOWLEDGED

ACHIEVEMENT FAME TOP PROFILES

PROFIT HARD WORK SUCCESS STRONG VICTORY FEAT VICTORIOUS BUSINESS HONOR PROSPEROUS

UNDEFEATED GAINFUL

PROVIDENCE BUSINESS NEWS PBN PROFIT EFFORT

INNOVATE FRUITFUL

BOOMING LEGACY RESULTS CHAMPION FORTUNE

ADVANTAGEOUS CREATIVE TRADITION CONQUEST NEWS

BEST DEDICATION VALUABLE TRIUMPHANT

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PROFILES OF SUCCESS 2018

SPONSOR MESSAGE



Chisholm Chisholm & Kilpatrick LTD
INTEGRITY RESPECT RESULTS

CHISHOLM CHISHOLM & KILPATRICK is excited to celebrate 20 years of serving disabled and injured clients. With an ethos rooted in effective advocacy and compassion since 1999, our public interest-focused practice has prospered through a team approach, and has grown from 5 to 150 dedicated lawyers and professionals. As we enter 2019, we look forward to continued growth in our practice areas, and adding to our team here in Providence, Rhode Island.

CCK is proud to have become the nation's largest Veterans disability law firm. CCK's insurance dispute and litigation practice group is a regional presence, and growing nationally, focused on assisting employees, professionals, and medical patients in their insured claims for treatment,

long-term disability (LTD), and other insurance benefits under ERISA and non-ERISA insurance policies. CCK also has a growing Bequest Management practice, which represents charities and non-profit organizations and is dedicated to seeing that they receive timely and full distribution of charitable bequests. Locally, CCK is proud to have helped launch and partner with the Veterans Law clinics at Harvard Law School and Roger Williams University School of Law.

We thank PBN for helping us share our message and congratulate our fellow Rhode Island businesses featured in Profiles of Success.

-J. Scott Kilpatrick, Managing Partner
Chisholm Chisholm & Kilpatrick LTD



Chisholm Chisholm & Kilpatrick LTD	page 2
Rhode Island Medical Imaging	4
Brown Medicine.....	6
Horsley Witten Group, Inc.....	8
Lax & Co.....	10
Office of Strategic Initiatives at the Alan Shawn Feinstein College of Education and Professional Studies	12

CHISHOLM CHISHOLM & KILPATRICK LTD

CCK Day, Newport 2018



On January 1, 2019, Chisholm Chisholm & Kilpatrick LTD will be celebrating its 20th anniversary. Since its founding in 1999, CCK has been dedicated to serving others and helping the community by offering unique representation in a variety of underserved benefits claims and appeals, and other services to non-profit clients. Over the years, CCK has developed a national practice and reputation, known for its ability to handle

complex cases involving veterans' benefits, long-term disability benefits, and insurance litigation. CCK has successfully litigated cases against some of the largest corporations and insurance companies in the nation, as well as the federal government, establishing a proven track record of success for clients. The firm has the largest and best-trained team of professionals in the country dedicated to representing disabled veterans and their families before the Department of Veterans Affairs, United States Court of Appeals for Veterans Claims, and the United States Court of Appeals for the Federal Circuit.

Created with a simple vision in mind to help those in need, CCK has transformed into a nationally trusted source of knowledge and support. "The growth we have witnessed over the years has been remarkable. CCK began with only a handful of individuals working collectively towards a common goal. Twenty years later, we have expanded not only in numbers but also in knowledge, as each team member adds to our understanding and contributes to our overall success. When combining over two decades of experience with a relentless desire to help others, our potential becomes infinite," said Robert V. Chisholm. "From humble beginnings to a bright future, CCK continues to evolve into a law firm marked by the highest degree of passion and professionalism."

GROWING IN NUMBERS

Currently employing about 150 dedicated and passionate

professionals, CCK has experienced notable expansion since its inception in 1999. Twenty years ago, CCK began with just 5 employees including founding partners Robert V. Chisholm and J. Scott Kilpatrick. While the firm's growth continues, CCK maintains and supports a collaborative and dynamic team atmosphere.

"Beginning with a tremendous partnership with my friend and respected colleague Robert Chisholm, and expanding on the principles and work ethic of our mentor Vincent Chisholm, we are proud to celebrate 20 years as Chisholm Chisholm & Kilpatrick," said J. Scott Kilpatrick. "We have grown into one of the largest law firms in Rhode Island, while adhering to our core commitments to represent those in need, including consumers, individuals, and most recently, non-profits and charities."

CCK hosts firm-wide events on a quarterly basis to cultivate this culture of camaraderie, including an annual trip to Newport, RI as well as yearly participation in a Providence-based 5k road race.

VETERANS LAW

Chisholm Chisholm & Kilpatrick LTD assists individual veterans with their VA disability claims and appeals, taking pride in serving those who have served our country. CCK has successfully argued cases before the Department of Veterans Affairs, the United States Court of



Founding Partners,
Robert V. Chisholm & J. Scott Kilpatrick

Appeals for Veterans Claims, and the United States Court of Appeals for the Federal Circuit. CCK is uniquely equipped and experienced in representing veterans in a variety of claims and appeals, including individual unemployability and exposure to environmental contaminants and herbicides.

ERISA LAW

CCK's ERISA attorneys have the knowledge and expertise to handle complex cases in long-term disability, short-term disability, life insurance, long-term care insurance, and pension benefits. Our team of experienced attorneys are able to interpret complex and confusing benefits plans, insurance policies, ERISA statutes, Department of Labor Regulations, and the case law of the federal courts in order to help individuals protect their entitlement to benefits.

PERSONAL INJURY LAW

At Chisholm Chisholm & Kilpatrick LTD, our personal injury lawyers assist individuals with maximizing compensation following serious injuries. Through our guidance and support, clients are able to focus on the process of recovery. CCK fights for the maximum compensation that an injured person is eligible to receive.

NEW PRACTICE AREA – BEQUEST MANAGEMENT

Chisholm Chisholm & Kilpatrick LTD has a devoted team of attorneys and professionals focused entirely on Bequest Management for charities and non-profits. Established on June 1, 2017, CCK's Bequest Management practice is dedicated to fulfilling the wishes of charitable donors while maximizing gifts

and minimizing administrative costs and burdens for non-profit organizations and charities. Our Bequest Management team understands the importance of planned giving to our non-profit clients and focuses on providing the following services to non-profit organizations and charities:

- Collecting and interpreting all applicable estate documents.
- Contacting and facilitating communication and progress with the personal representative or trustee of each estate.
- Facilitating the administration process, maximizing distributions, and protecting the organization's bequest.
- Recognizing potential administration issues and developing proactive solutions.
- Overseeing and facilitating resolution of any disputes.
- Providing customized real-time access to case information and documents for non-profit clients.
- Maintaining donor relationships for current and future generations.



Team CCK, Providence Downtown 5k, 2018



Chisholm Chisholm & Kilpatrick LTD
INTEGRITY RESPECT RESULTS

PRIMARY PRODUCT/SERVICE

Chisholm Chisholm & Kilpatrick LTD is a law firm offering an array of highly effective public interest legal services tailored to clients' needs in the areas of Veterans Law, ERISA Law, Insurance Disputes and Litigation, and Bequest Management. CCK is committed to finding the best, and most cost effective, solution for each and every client. Most of the firm's work, across all practice areas, can be performed on a value-conscious contingency basis, where the client's fee is based on and paid from the firm's successful results, and in the event that the firm representation is not successful, there is no fee.

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RHODE ISLAND MEDICAL IMAGING



FROM THE PRESIDENT

2018 is RIMI's 75th anniversary and throughout these 75 years, RIMI has had a front row seat to the everchanging healthcare paradigm that has witnessed many other healthcare practices, clinics, and hospitals fall by the wayside. We have survived to this day because we have never lost our focus on providing the very best care to our patients. From cutting edge technology and treatments, to the best clinical staff and physicians, to top notch facilities and services, RIMI's sole focus remains the patient. As we celebrate our first 75 years, I look forward to the next 75 years.

Dr. John Pezzullo

Since 1943 Rhode Island Medical Imaging (RIMI) has been providing southern New Englanders with imaging excellence. RIMI has a network of 12 private state-of-the-art medical diagnostic imaging facilities across the state, staffed by over 70 board certified radiologists with broad-based experience and subspecialty training.

RIMI radiologists interpret imaging in Rhode Island at Hasbro Children's Hospital, Miriam Hospital, Our Lady of Fatima Hospital, Rhode Island Hospital, Roger Williams Medical Center, and Women & Infants Hospital, and most recently at Sturdy Memorial Hospital in Attleboro, MA. Most of RIMI's radiologists are faculty members at the Warren Alpert Medical School of Brown University.



RIMI's Breast Imaging Center in East Greenwich

RIMI has full service locations in Barrington, Cranston, East Greenwich, Lincoln, North Providence, Pawtucket, Providence and Warwick as well as smaller sites in Coventry, East Providence, Lincoln (Wake Robin) and Warren.

RIMI invests in the best imaging technologies, including the first and most extensive 3T MR imaging network in Rhode Island, which means patients receive the highest quality images available today, faster exams and in more comfort than ever before.

Patients who come to RIMI know that their Bone Density (DEXA), Computed Tomography (CT), Magnetic Resonance Imaging (MRI), Mammography, Ultrasound, and X-ray results are the most accurate diagnostic results possible because they are reviewed by world class radiologists. The best healthcare depends on the quality of medical imaging and the physicians who read them.

RIMI radiologists are trained to look at complex images inside the human body and detect what is causing a patient's symptoms. Typically, it is the RIMI radiologist who actually diagnoses any issues a patient is experiencing, which in turn provides the patient's team of physicians the information that will help determine their best treatment.

RIMI radiologists are different because they all

have received extra training in special areas. For example, a brain MRI will be read by a neuroradiologist, a mammogram will be read by a women's imager, and a sports injury will be read by a musculoskeletal radiologist. RIMI's breadth of sub-specialty expertise is unmatched in Rhode Island.

RIMI's physicians have also been entrusted to train the next generation of radiologists as faculty members of The Warren Alpert Medical School of Brown University. Additionally, RIMI radiologists are leaders in imaging research and many of them present at conferences throughout the United States and worldwide.

RIMI opened a new Breast Imaging Center in East Greenwich this August. It has a warm and welcoming spa-like boutique feel and offers convenient breast healthcare to all Rhode Islanders. No other facility like this currently exists in the state.

At the Breast Imaging Center patients find fluffy pink robes (no hospital gowns here), hot and cold beverages and a staff of highly skilled physicians, who are specially trained to read breast images, ensuring patients get the most accurate diagnostic results possible.

3D mammography, also known as breast tomosynthesis, is done on-site. This procedure creates a series of extremely clear images of the breast tissue, including dense breasts, which



Rhode Island Medical Imaging Breast Imaging Center radiologists. Top row: Elizabeth Lazarus, MD, Susan Koelliker, MD, Robert Ward, MD, Z Liu, MD, Bianca Carpentier, MD, Martha Mainiero, MD, Ana Lourenco, MD, Elizabeth Dibble, MD, Hanan Khalil, MD; Bottom row: Vincent DeCesaris, MD, Linda Donegan, MD, Mary Hillstrom, MD. Not pictured: Shruthi Ram, MD, Mark Ridlen, MD.

makes it easier to see if there is anything to be concerned about. Breast ultrasound as well as breast biopsy are also performed here.

RIMI has the first non-hospital-based 3D tomosynthesis-guided Brevera Breast Biopsy System in Rhode Island. This advanced technology means patients will experience faster procedures, spend less time under compression and ultimately have a more positive biopsy experience.

Patients trust RIMI because they know that RIMI uses high quality technology, their images are read by highly trained doctors, and customer service is a top priority.

The American College of Radiology (ACR) named RIMI one of the first outpatient diagnostic imaging Centers of Excellence (COE) in the country and the first in Rhode Island. The rigorous COE process takes accreditation to a much higher level and offers RIMI the unique ability to set the benchmark for superior quality in diagnostic imaging. As a COE facility, patients can be sure that RIMI:

- Provides patients with the utmost confidence of receiving today’s highest levels of imaging quality, safety and care
- Offers excellence at multiple levels – the professional staff, technology, policies and procedures
- Has exceeded the standard requirements of accreditation
- Has an ongoing process for self-assessment and improvement

The ACR award formally recognizes RIMI’s ongoing commitment to providing the highest quality of medical imaging in Rhode Island. RIMI’s outstanding radiologists combined with state-of-the-art imaging technology offers patients the ultimate diagnostic imaging experience – unrivaled by any other imaging center in the state.



RHODE ISLAND MEDICAL IMAGING

COMPANY INFORMATION

Rhode Island Medical Imaging (RIMI) has a network of 12 private state-of-the-art medical diagnostic imaging facilities that are staffed by over 70 board certified radiologists with broad-based experience and subspecialty training.

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YEAR ESTABLISHED

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RIMI BOARD OF DIRECTORS



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President



John Cronan, MD
Ex Officio



Peter Evangelista, MD
Vice President



Bryan Jay, MD
Vice President



Michael Beland, MD
Treasurer



Brian Murphy, MD
Secretary

BROWN MEDICINE



Brown Medicine offers comprehensive, personalized medical care that is truly “patient first.” As a nonprofit primary care, specialty outpatient and subspecialty medical group practice, Brown Medicine employs over 200 physicians at multiple patient care locations across Rhode Island.

Brown Medicine is affiliated with The Warren Alpert Medical School of Brown University and employs most of the full-time faculty of Brown’s Department of Medicine. This connection to the Medical School and local hospitals means physicians have access to the most advanced medical research, clinical protocols and technology. Additionally, Brown Medicine annually provides leadership and training for more than 400 medical students, residents and fellows, further cultivating a continuous exchange of new ideas and the latest skills and treatment options.

Along with general internal medicine and primary care services, Brown Medicine offers diagnostics and treatments in the specialty fields of allergy and immunology; endocrinology; gastroenterology; general internal medicine; geriatrics and palliative medicine; hematology/oncology; hospital medicine; kidney disease and hypertension; infectious diseases; primary care; pulmonary/critical care and sleep medicine; rheumatology; and travel medicine.

At the heart of Brown Medicine is

its Patient Center at 375 Wampanoag Trail in East Providence, where eight Brown Medicine practices and its Travel Clinic are located. The state-of-the-art building is one of just a few healthcare facilities in the region designed to support the “patient-centered medical neighborhood” model of care, which allows for collaboration and coordination between primary care and the specialties. Also at this location is a blood drawing laboratory, imaging services and Brown Medicine’s pulmonary function laboratory which adds to patient convenience and comprehensive care.

In addition to the Patient Center, Brown Medicine offers patient care locations in



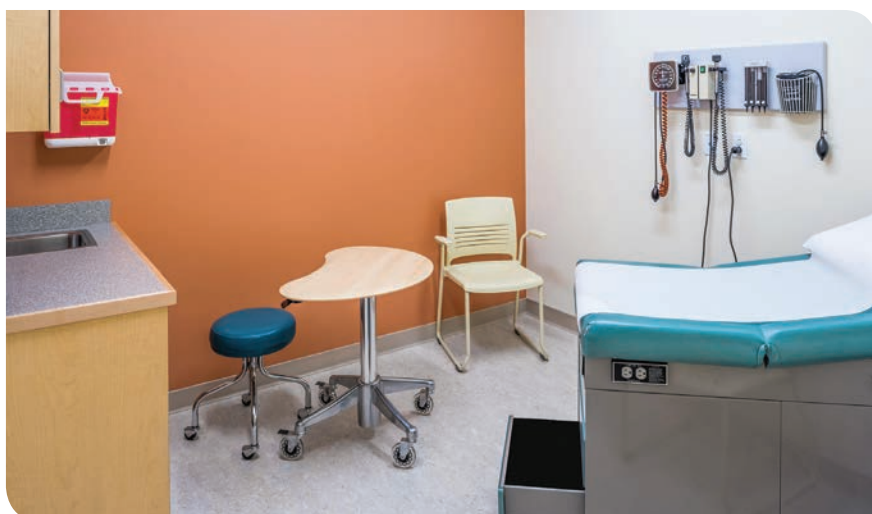
Providence, Warwick, East Greenwich, West Warwick, and Middletown. Over 100,000 patients are served annually from Rhode Island, Massachusetts, Connecticut, and other states and countries. Leadership and patient care services are also provided at hospitals throughout the Ocean State, including Rhode Island Hospital, The Miriam Hospital, Kent Hospital and The Veterans Administration Hospital. The newly opened Brown Medicine Endoscopy Center, located in East Providence, provides outpatient upper endoscopy and colonoscopy services.

Brown Medicine’s mission to incorporate expertise in patient care, teaching and research into “a greater good” provides heightened meaning and purpose and sets the organization apart from all other primary care and internal medicine practices in Rhode Island. It is by embracing this tripartite mission that Brown Medicine provides a unique service to its patients, colleagues and to the worldwide community. Brown Medicine’s commitment to knowledge and discovery places it at the forefront of medicine.

Behind the scenes, Brown Medicine’s administrative

services are centralized and led by an experienced management team that supports providers and their patient care offices, research facilities and teaching missions in the functional areas of analytics, compliance, contracting, electronic medical records, finance/accounting, human resources, information technology, operations, practice management and research.

As part of fostering an understanding of best business practices and medicine, Brown Medicine has partnered with the Bryant University Executive Development Center on a Leadership Academy for physicians and other healthcare professionals. This four-month program teaches those working in medicine and healthcare the core skills needed to be effective leaders within an academic medical center while maintaining patient care as the primary focus.



Originally established as University Medicine, Brown Medicine was created in 2000 with the consolidation of Rhode Island Hospital Medical Foundation and University Physicians Foundation, both of which formed around 1990. Brown Medicine is part of Brown Physicians, Inc. (BPI), a clinical, research and teaching affiliate of the Warren Alpert Medical School. BPI is comprised of six foundations: Brown Dermatology, Brown Emergency Medicine, Brown Medicine, Brown Neurology, Brown Urology, and University Surgical Associates.

By having skilled, highly qualified physicians in multiple office locations as well as housed together in its Patient Center and Endoscopy Center, Brown Medicine provides seamless, connected primary care and specialty services for adults of all ages. One call connects patients to Rhode Island's most advanced, comprehensive medical network for healthcare needs.

The goals of Brown Medicine are embedded in its three-part mission of patient care, research and teaching, following the principles of:

- Provide compassionate, accessible, evidence-based, state-of-the-art, quality medical care to our patients
- Excel in research that leads to the improvement of healthcare and medical advances locally, nationally and internationally
- Focus our clinical expertise and scientific knowledge on teaching and mentoring the next generation of clinicians,



BROWN MEDICINE
BROWN PHYSICIANS, INC.

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educators and investigators

- Promote citizenship by providing care to underserved populations through global initiatives, volunteering in local agencies and serving in professional organizations
- Encourage the individual growth, health and professional accomplishments of all employees
- Maintain integral partnerships with members of our community (other academic groups, our hospitals, our medical school, individual practitioners and the community at large)

HORSLEY WITTEN GROUP, INC.

“

Your strength is your commitment to a set of principles – you understand and value the integration of the functional solution with the aesthetic and ecological component. You’re a trusted team member because I know you “get it” and are in support of the larger goal, not just your specialty.

Donald Powers, AIA
Founding Principal
& President
Union Studio
Architecture and
Community Design



SUSTAINABLE ENVIRONMENTAL SOLUTIONS – 30 YEARS STRONG

Thirty years ago, Horsley Witten Hegemann, Inc. opened its first offices in Barnstable and Cambridge, MA. The company’s projects focused on wellhead protection and community planning in Massachusetts. The company expanded, changed its name twice (Horsley & Witten, Horsley Witten Group, Inc.), and the rest is history. Today, Horsley Witten Group, Inc. is a New England-based consulting firm focused on engineering, planning, and environmental

science. We provide sustainable design solutions to clients not only in New England, but in all 50 states, and as far away as Guam and Saipan. We are a firm founded on the principles of natural resource protection and sustainable approaches in the built environment. This separates our work from the more traditional engineering or planning firms, as our mission since 1988 has always been the conservation, preservation, and protection of our natural resources.

PLANNING FOR A SUSTAINABLE FUTURE

We are a recognized leader in the planning field and have established long-term working relationships with the U.S. Environmental Protection Agency, National Oceanic and Atmospheric Administration, and numerous state and local governments. Assessment of infrastructure, asset inventory, zoning reform, and public spaces make up a significant portion of our planning portfolio. Our long history of public participation, outreach, and planning makes us uniquely qualified to help local stakeholders balance environmental, economic, and social needs in their community. This balanced approach is often applied to “place-making” as the foundation for long-term economic viability, housing choice, and innovative environmental solutions. Every type of community can benefit from this approach, which shows in our experience with urban, suburban, and truly rural communities.

Our community planning experience is coupled with a deep portfolio of sustainable design projects and engineering innovation. The quality of these projects demonstrates our commitment to providing and sustaining walkable, vibrant places that enhance the urban ecology. Our group in Providence is a seasoned



team of collaborators and innovative engineers, planners, landscape architects, and urban designers who are passionate about stormwater planning, design of urban spaces, and multi-modal opportunities in our cities and towns.

TEAM APPROACH – EXPERIENCE MATTERS

Our team’s diversity of skills and our dedication to the principles of livable, lovable, and connected neighborhoods give us a competitive edge in New England. Collaboration, whether with our fellow HW colleagues or with our client, is a priority as we listen, guide, and support our clients’ goals.



IN THE COMMUNITY

Our dynamic Providence team is invested in local organizations and supportive of initiatives that foster a live.work.play environment. We are dedicated to the growth of our diverse professional disciplines and are active members of the American Planning Association (APA), the Congress of New Urbanism (CNU), the American Association of Landscape Architects (ASLA), and One Neighborhood Builder’s to name a few. Support for these groups includes sponsorship and participation in National Parking Day each year and many other activities of the local ASLA, APA, and CNU chapters. We also support local non-profits like the RI Green Infrastructure Coalition and the Steel Yard in Providence.

Members of the Providence team routinely participate as panelists at regional and national planning conferences. Both Jon Ford and Nate Kelly are past Presidents of local APA and CNU chapters. We also regularly serve the Massachusetts Executive Office of Energy and Environmental Affairs (EEA) and Grow Smart RI in an advisory/training role. Most of our training over the past five years has been in the fields of advanced zoning techniques, planning for village development, innovative subdivision design, Low Impact Development (LID), and climate change preparation.

RI PARTIAL CLIENT LIST

- Norman Bird Sanctuary, Middletown
 - Roger Williams Park, Providence
 - University of Rhode Island, South Kingstown
 - Narragansett Bay Commission
 - City of Providence
 - Rhode Island Statewide Planning
 - Town of South Kingstown
 - The Steel Yard
- Dozens of Rhode Island Housing funded mixed-use and affordable housing redevelopment projects



PRIMARY PRODUCT SERVICE

Environmental Consulting: Planning, Engineering, Landscape Architecture, Training, Outreach

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YEAR ESTABLISHED

1988

LAX & CO.



FROM THE PRESIDENT:

Lax & Co. has come a long way from its humble beginnings. Like many in our industry, ours is a multi-generational firm. By challenging the model, and striving to do things differently, we create an experience unique to each client.

I couldn't be prouder of the quality of services Lax & Co. provides to both the local, and national market, or of the growth that we have experienced. Our firm has become recognized as an industry leader and continues to be a trusted advisor to those we serve and partner with.

Ryan Alan Lax
President



Kristin Anastasiades,
Director of New Business
& Operations, and
Danny Bullock, Client
Services Manager

For nearly half a century, Lax & Co. has been privileged to help those in pursuit of their financial goals. Our firm specializes in concierge, high-end life insurance, retirement and investment services. This extraordinary amount of time in the industry has allowed our business to thrive and provide both businesses and individuals the support and tools needed to protect their families, manage their wealth, and plan for their family's future.

Rhode Island is truly something special, and it is important to Lax & Co. to represent it well on a national level. In order to achieve this goal, we worked hard and qualified to become the only financial firm in Rhode Island to be a proud owner of Lion Street, a privately-held, advisor-owned life insurance distribution company based in Austin, Texas in 2015.

Lion Street provides elite independent life insurance producers access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of their high-net-worth and corporate clients.

As Advisor-Owners we benefit from a carrier/product agnostic platform, specialized resources, proprietary technology, intellectual capital, and the collective clout of a nationwide network of elite, life insurance-centric practices, enhancing our ability to meet the complex planning requirements of any client.

In addition to this, Lax & Co. President, Ryan Alan Lax, became the only Rhode Island businessperson to be accepted as a member of the Forbes Boston Business Council. This invitation-only community is for successful business owners and

leaders in Greater Boston and the surrounding area.

Ryan was vetted and selected by a review committee based on the depth and diversity of his experience. Criteria for acceptance include a track record of successfully impacting business growth metrics, as well as personal and professional achievements and honors.

Transparency is crucial when it comes to the financial planning process. Lax & Co. is committed to maintaining the highest standards of integrity and professionalism in our relationship with our clients. By taking the time to know and gain an understanding of their financial situation, we can then provide only the highest quality information, services, and products to help clients reach their goals.

Our firm also prides itself on having no proprietary products, providing knowledgeable advice, and being solutions-centric. By not selling proprietary products, Lax & Co. is not influenced by a preconceived solution. In addition, the firm has developed an industry proficiency that is hard to match, and can independently provide clients with the best possible strategies and products available. These decisions, coupled with the expertise of the firm, allow Lax & Co. to focus on being a problem-solver as opposed to a product-pusher.



To help mitigate risk, Lax & Co. leverages their own underwriting process, and is proud to offer concierge underwriting to all clients. This includes case reviews, summaries, consulting, advocacy and negotiation with carrier underwriters, across all carriers available through Lion Street. Lax & Co. is one of the very few firms to have their own trusted and tested concierge underwriting process. Coupling their genuine interest and concern for the client with a process backed by Lion Street's team of underwriting experts, the client achieves the best possible outcome. Capitalizing on many years of experience in underwriting with distribution companies, carriers, and BGAs, our team specializes in case design for large, complex, or high-risk cases.

Leveraging the latest technology and platforms, our firm endeavors to be a leader in using the most innovative, yet sensible systems to support our clients reach their goals. These platforms allow our professionals the ability to monitor progress, and suggest adjustments when things look like they should be changed. Using technology allows our firm to engage in more frequent, proactive conversations with our clients.



It takes a team, and Lax & Co. believes that proactive and open communication with a client's tax and legal professionals is a crucial piece of what can often feel like a siloed process. Our firm enjoys strong relationships with reputable estate planners and CPA firms. Bringing together all the pieces of the plan, talking to each other, and working together with our clients is an important part of what makes us different. Nothing is more effective for the client than this collaboration.

"We built our reputation in Rhode Island, and now on a national level, for being a strong partner with those professionals that work with our clients. Everyone working together in tandem is what makes a financial plan do what it is supposed to. The key isn't to have one expert, but instead have an expert in each area of the process," says Ryan Alan Lax, President.

Giving back to the community is something Lax & Co. takes seriously and prides itself on. We are a proud corporate sponsor and partner of The Tomorrow Fund, a Rhode Island non-profit that supports families whose children have been diagnosed with cancer. In addition, the firm is also a proud corporate sponsor and partner of The Gentlemen's Retreat, a nonprofit organization with the mission of providing high potential, college-bound inner-city high school young men with the inner tools and vision to be self-directed and self-sufficient in high school, college, their careers and adulthood.



Kristin Anastasiades and Ryan Lax speaking at Indaba, the national conference for Lion Street Owners.



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SOCIAL MEDIA



YEAR ESTABLISHED
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Lax & Co. and Cadaret, Grant are separate entities.

OFFICE OF STRATEGIC INITIATIVES

AT THE ALAN SHAWN FEINSTEIN COLLEGE OF EDUCATION AND PROFESSIONAL STUDIES



The staff of the Office of Strategic Initiatives

FROM THE DIRECTOR

The Office of Strategic Initiatives (OSI) creates learning partnerships with businesses and organizations throughout the state and region. Working together with our partners, we design and deliver high quality, innovative and flexible professional development strategies to grow the skills of Rhode Island's workforce.

We offer a wide variety of certificate programs, credit programs, and non-credit seminars and institutes for professionals to meet current professional requirements and broaden their skills in specific areas. Courses and programs are designed to provide essential skills and knowledge needed for participants to feel more confident in their professions and increase career opportunities. We have partnerships across many business sectors, including Healthcare, Insurance, Education and Manufacturing.

A sample of our current offerings include C-suite leadership development programs, supervisor and manager skill development, strategic planning,

and other organizational development strategies.

Our mission directly aligns with the governor's workforce development plan and provides a new approach to workforce development, bringing together "our public schools, our colleges and universities, and our state's employers to reimagine the way we train our workforce."

The OSI team designs the course, program or organizational initiative that meets the real needs of today's businesses for maximum results.



Deborah Mathews
Executive Director
Office of Strategic Initiatives at URI

THE
UNIVERSITY
OF RHODE ISLAND

ALAN SHAWN FEINSTEIN
COLLEGE OF
EDUCATION AND
PROFESSIONAL STUDIES

The Office of Strategic Initiatives offers a wide variety of certificate programs, credit programs, and non-credit seminars and institutes for professionals who wish to meet current professional requirements and broaden their skills in specific areas. Courses and programs are designed to provide essential skills and knowledge needed for participants to feel more confident in their professions and increase career opportunities

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WEBSITE

web.uri.edu/ceps/
office-of-strategic-initiatives/programs

The Office of Strategic Initiatives is proud to work with the following industry partners:

- **Care New England** (organization-wide training initiatives)
- **South County Hospital** (credit courses for nurses)
- **Toray Industries** (multi-level leadership development programs)
- **AstroNova, Inc** (multi-level leadership development programs)
- **Taco Comfort Solutions** (multi-level leadership development programs)
- **Dominion Diagnostics** (multi-level leadership development programs)
- **Real Jobs Rhode Island** (The Leadership Partnership of Rhode Island)
- **General Dynamics Electric Boat** (multi-level leadership development programs)
- **Thundermist Health Center** (interdisciplinary leadership development program)

In addition, OSI offers the following credit degree programs and non-credit certificate programs, in collaboration with industry partners and departments within the University:

UNDERGRADUATE DEGREE PROGRAMS:

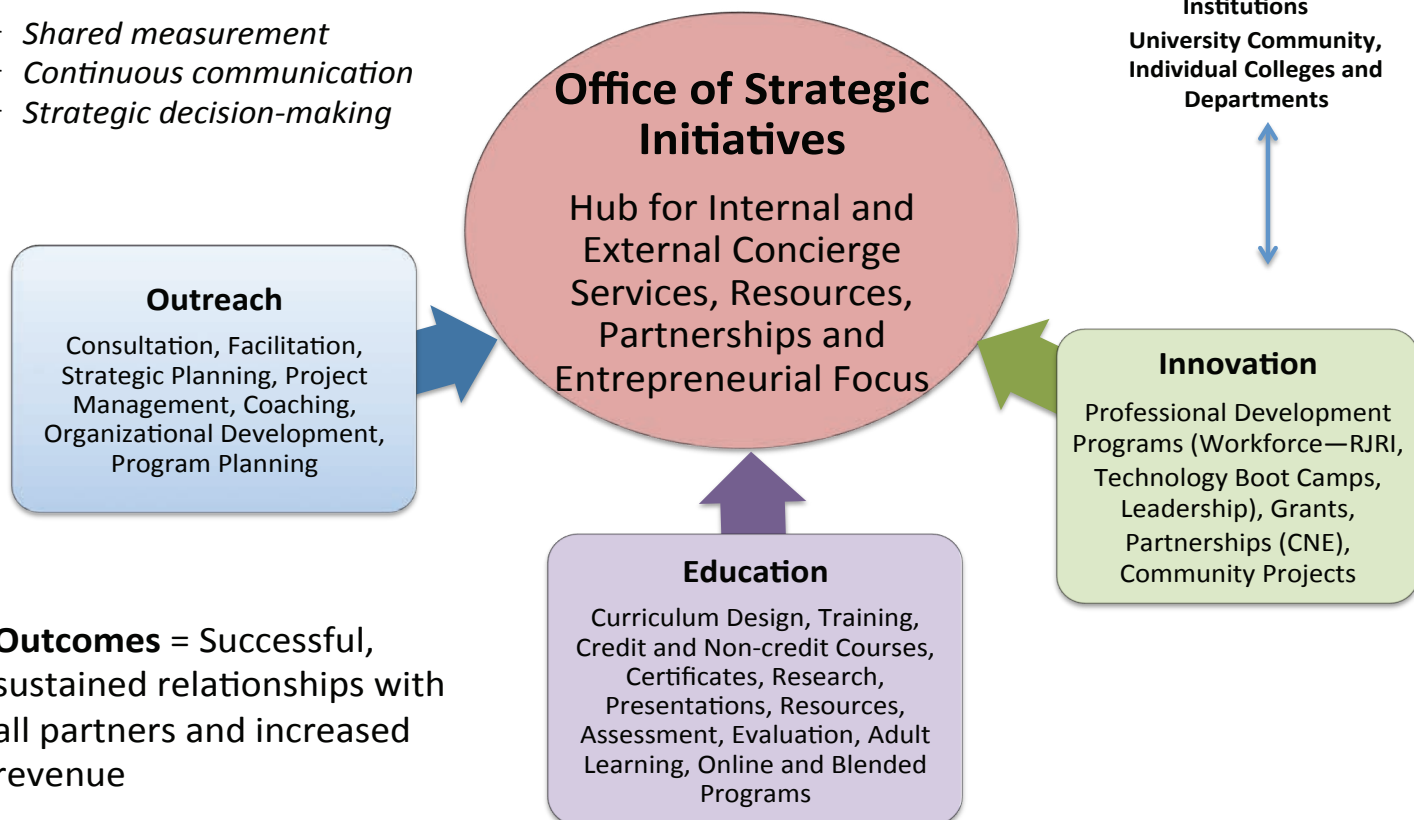
- **RN to BS** (partnership with the URI College of Nursing)
- **Biotechnology Manufacturing (B.S.)** (partnership with URI College of Environment and Life Science)

GRADUATE CERTIFICATE PROGRAMS:

- **Cyber Security** (partnership with URI Computer Science)
- **Digital Forensics** (partnership with URI Computer Science)
- **Digital Literacy** (partnership with URI School of Education and Harrington School of Communication and Media)
- **Human Resources** (partnership with URI Schmidt Labor Research Center)

Bringing people and resources together to achieve positive change

- ✧ *Shared measurement*
- ✧ *Continuous communication*
- ✧ *Strategic decision-making*



Outcomes = Successful, sustained relationships with all partners and increased revenue

Collective Impact



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