

Preferred Service Providers for Nonprofits and Philanthropy Focused Brands



Nancy Batterman / nancy@resultsimproved.com / www.resultsimproved.com
Specialties: Executive Coach and Nonprofit Strategist, Strategic Planning, Leadership Team Alignment & Sustainable Growth.
Awards + Accolades: Nonprofit Executive for over 30 years
LinkedIn: [Nancy Batterman](#)



Sam Brown / sbrown@ranchomesa.com / www.ranchomesa.com
Specialties: Business Insurance Broker for Nonprofit and Human Service Agencies
Awards + Accolades: National Best Practices Insurance Agency; 2019 Vocational Visions Vendor of the Year; North County Lifeline 2021 Volunteer of the Year
LinkedIn: [Sam Brown](#)



Rick Dahlseid, MST, CPA / rick@PBOAdvisory.com / www.PBOAdvisory.com
Specialties: Fractional CFO Services; Nonprofit Financial Management; General Business Advisory Services; Outsourced Accounting Services; Outsourced Human Resources
Awards + Accolades: Best Places to Work; 2021 SD Metro Men of the Year; 2020 Finalist - CFO of the Year
LinkedIn: [Rick Dahlseid](#)



Ashley Lopez / alopez@banksocal.com / www.banksocal.com
Specialties: Commercial Banking; Treasury Management; Commercial Real Estate Loans; Lines of Credit; Term Loans
Awards + Accolades: The Findley Reports-Super Premier Performing; Bankrate.com-4 Star Safe + Sound Rating; SDBJ Best Places to Work 2018-2021
LinkedIn: [Ashley Lopez](#)



Mark Neilson / mark.neilson@accretivesandiego.com / www.accretivesandiego.com
Specialties: Cost Savings; Using Cost Savings as a New Source of Nonprofit Revenue; Executive Peer Groups; CFO Mentoring; Board Expertise (for profits and nonprofits)
LinkedIn: [Mark Neilson](#)



Denise Scatena / denise@scatenadaniels.com / www.scatenadaniels.com
Specialties: Public Relations; Community Relations; Marketing Communications; Media Outreach; Media Training
Awards + Accolades: SDBJ San Diego 500; PRSA San Diego Professional of the Year; San Diego Press Club Excellence in Journalism
LinkedIn: [Denise Reinicke Scatena](#)

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