

*GROWING A BETTER
WAY TO WORK.*



THE TALENT BOOK



GRIFFEN O'SHAUGHNESSY

LETTER FROM GRIFFEN

Hello,

At Canopy, we have spent the last decade reimagining the traditional pathways to success. Our vision includes an innovative workforce that's built on trusted, reliable experts doing what they do best. We help organizations who need additional resources find the right talent quickly through our pool of vetted high-level professionals.

These highly qualified experts can immediately impact your organization in the fields of finance, business strategy, marketing, nonprofit, leadership development, public relations, human resources, and DEI. This magazine highlights a few of our advisors in each of these categories to demonstrate the depth and breadth of our resources.

We are happy to help you identify or clarify your needs and introduce you to one of our vetted professionals. When you're ready to get started, please email me at griffen@canopyadvisory.com and we'll set up a call to discover more.

Best,
Griffen

THE CANOPY DIFFERENCE

You know your goals. We know the talent to help you achieve them. We're here to foster growth, accelerate performance and tackle your challenges with our network of top-tier professionals. More than a better way to grow—a better way to work for everyone.

EXCEPTIONAL EXPERTISE

15+
Years

experience, on average,
trusted by the world's
biggest brands

CAREFULLY CURATED

5-Point

quality assessment results
in an extraordinary team
of experts

NIMBLE WORKFORCE

1-Week

fast track start means an
expert can immediately
impact your organization

PROVEN RESULTS

99%

client retention rate based
on successful expert
matches

OUR SIMPLE PROCESS

How you build teams matters not only in how you problem solve but also in implementing strategies that are effective and can scale over the long term. Here is how we work to build the right teams for you.

1. IDENTITY TALENT

Canopy sources our leading talent through trusted referrals

2. INTERVIEW AND SELECT

Only top-tier candidates are invited to join

3. EXCEPTIONAL QUALITY TRAINING

Our experts are trained to seamlessly integrate into your organization

4. CONNECT

We work to understand your needs to accurately match expertise to the role

5. REVIEW INSIGHTS

Canopy offers insights and counsel every step of the way to ensure success

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MEET THE TEAM

THE RIGHT TALENT FOR YOUR BUSINESS



Griffen O'Shaughnessy

FOUNDER AND CEO

Griffen is an attorney and CPA with more than twenty years of professional experience. She worked in Holland & Hart's mergers and acquisitions practice until the fall of 2009 when she started Canopy. Griffen also worked in the audit group of Arthur Andersen before attending law school at American University.



Mary Clare Pittinos

DIRECTOR OF OPERATIONS

With more than 20 years of experience working for small and mid-sized business, Mary Clare "MC" Pittinos provides a broad range of skills including data asset management, process automation and development, and marketing communications. Her ability to apply real world experience to everyday opportunities and obstacles allows the Canopy team focus on providing an unparalleled level of service to its consultants and clients.



Violeta Madera

FINANCE MANAGER

Violeta is a bilingual finance expert with extensive knowledge in various online platforms and a track record of customer success. She is a highly motivated and dedicated Business Management graduate who provides optimum customer service and is a proven fast learner.



Serena Robinson

MARKETING AND EVENTS MANAGER

Serena is marketing and events manager at Canopy and joined the team in 2018. She is a New York City native with over twelve years of events, marketing and public relations experience - from marketing and events at financial firms, to start-ups, art and design companies and non-profit organizations.



Francis Cudihee

DIRECTOR OF BUSINESS DEVELOPMENT

Francis is an attorney and mediator with over a decade of professional experience. He worked as a business attorney, litigator, and mediator until joining Canopy in 2022. Francis has experience in business ownership, having founded and managed his own law firm in 2017.

Bennie F.

LEADERSHIP

From undrafted free agent to Superbowl Champion and 8-year veteran of the NFL, Bennie Fowler supports Executives, Leaders and Organizations to step into the infinite potential through the power MVP Leadership.

Bennie, is an eight-year veteran of the National Football League. He began his career as an undrafted free agent signed by the Denver Broncos in 2014. Bennie was a member of the 2016 Denver Broncos Super Bowl 50 Championship Team and may be best remembered for having hauled in the final pass of soon to be Hall of Famer Peyton Manning.



LEADERSHIP

LEADERSHIP TRAINING | PROFESSIONAL DEVELOPMENT | PLAN | TEAM BUILDING | CAREER |
COACHING | EVALUATOR | LIFE COACH | ORGANIZATIONAL CULTURE |
STAFF WELLNESS PROGRAM | LIFE COACH





LEADERSHIP



Andy C.

LEADERSHIP

Andy is a proven operations, finance, and business strategy executive with 20+ years of transforming and scaling successful technology businesses. Currently, as Founder and CEO of Bearing PointStrategy LLC, Andy provides consulting and executive coaching services to help companies get their operational bearings.



Dirk D.

LEADERSHIP

After an early career in corporate finance with Fortune 100 companies, Dirk spent a decade in sales, marketing, and organizational performance leadership roles with global and national scope.



Bennie F.

LEADERSHIP

From undrafted free agent to Superbowl Champion and 8-year veteran of the NFL, Bennie supports Executives, Leaders and Organizations to step into the infinite potential through the power MVP Leadership.

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Lora C.

LEADERSHIP

Lora is an attorney, leadership consultant, and burnout recovery expert. After leaving Great-West Life & Annuity Insurance Company where she focused on compliance and litigation, she founded Lora, Life Choreography a boutique coaching and wellness firm.



Kellie J.

LEADERSHIP

Kellie is a Leadership Coach and a Leadership Development Consultant. She has experience in the design, delivery and management of global leadership development programs for senior executives and brings to this work the structure and detail orientation of her accountant roots, and more than 15 years of experience in global professional services firms, in a variety of client facing and internal roles.



Jeff K.

LEADERSHIP

Combining 25 years of operational, relationship management and sales leadership experience with 20 years of back-country wilderness adventure, Jeff bring a unique approach to guiding a wide variety of firms and their executives through particularly challenging organizational hurdles.

Cindy B.

FINANCE

Cindy is a seasoned investment and finance executive with a unique skill set acquired in both Wall Street and entrepreneurial settings. She has unmatched experience in complex M&A transactions, carve-outs, financial modeling, investment research, market studies, and senior leadership communication. Cindy was recently the Director of Research for Bow River Capital Partners, based in Denver, CO. Prior to that, Cindy spent nearly a decade vetting and executing transactions for Cerberus Capital Management, a multi-billion dollar alternative investments firm based in New York City. Cindy started her career working with Silicon Valley's leading technology firms at Arthur Andersen's San Francisco valuation practice.

Cindy serves as Treasurer on the Board of Inside the Orchestra, an organization that brings orchestra music to young children in the greater Denver area. Cindy has lived in Colorado since 2001 and enjoys spending time exploring Colorado's mountain communities with her husband, two sons, and golden retriever.



FINANCE

CFO | CONTROLLER | FINANCE | CPA | FINANCIAL PLANNING | FINANCIAL MANAGEMENT
| FINANCIAL ANALYST | DATA ANALYST | BUSINESS PLAN | CASH FLOW STATEMENT |
BUDGETING | INVESTOR RELATIONS | MERGERS AND ACQUISITIONS | VALUATION | DUE
DILIGENCE | BUSINESS PLAN WRITING | BOOKKEEPING | ACCOUNTING





FINANCE



Jennifer A.

FINANCE

Jennifer is a certified public accountant who began her career at Deloitte & Touche in Denver. Throughout her 12 years of public and private industry experience, she has demonstrated expertise in end-to-end public company disclosure, including SEC reporting, investor relations, strategic communications, accounting operations and financial analysis.



Elizabeth C.

FINANCE

Elizabeth is a finance and productivity expert with more than 25 years of diversified experience in financial planning & analysis, strategic planning and investor relations. Her strong “Big Four” financial acumen, exceptional analytical skills and high technical aptitude support more than 20 years of effectively increasing productivity through process design, automation and optimization.



Joe M.

FINANCE

Joe is a trusted and influential senior finance and strategy executive leveraging the in-depth understanding and knowledge about business and investments gained from 20+ years of conducting investment research and analysis in both the public and private capital markets, working on a range of different entrepreneurial pursuits and interesting advisory projects, and being a small business owner.

Our highly qualified experts can immediately **impact** your organization.



Robyn L.

FINANCE

Robyn has 15+ years of public accounting and consulting experience working with a range of Fortune 500 and smaller high-growth companies, most recently with KPMG in New York and LA. Robyn's external audit experience includes SEC reporting, review of audit work and development of audit strategy.



Emily A.

FINANCE

Emily brings over 15 years of strategy and financial leadership experience in startups, venture capital, and impact investing. She began her career in Financial Services in NYC before transitioning into strategy and finance roles in small clean energy companies and startups. Emily is experienced working with executive leadership, boards, and investment committees in various size organizations and companies.



Dean M.

FINANCE

Dean started his career in academia, with a Ph.D. in theoretical physics. He had hoped to be a professor, and did this for a bit. But, with a pending marriage, and a tough job market in academics at the time, he soon decided to go in a different direction --- to get a real job!

Sami I.

BUSINESS STRATEGY

With over 20 years of consulting and leadership experience, Sami excels in dynamic and complex environments. Following his consulting career with Arthur Andersen and Protiviti, he spent 16 years as co-founder and CEO of a boutique consulting firm delivering over \$350MM in client recoveries. A quick learner, Sami has served over 60 clients, with focus on publicly held Telecommunications and Energy companies. His consulting experience includes a wide range of Audit, Margin Recovery, Compliance, Regulatory, Technology, Dispute and Restructuring projects, including many with multi-national teams.

Having experienced the many ups and downs of running a boutique consulting practice, Sami is committed to applying these lessons to helping growth companies manage human energy in a way that drives sustainable success. By taking a holistic view of how vision, people, data, problem solving and accountability drive success, Sami helps organizations advance from firefighting to making, and implementing, thoughtful and timely decisions that align with the company vision and strategy.



BUSINESS STRATEGY

COO | CHANGE MANAGEMENT | PROJECT MANAGEMENT | STRATEGIC PLANNING
| MANAGEMENT TRAINING PROGRAMS | CRISIS MANAGEMENT | DUE DILIGENCE |
POLITICAL RISK | MARKET RESEARCH





BUSINESS STRATEGY



Ed B.

BUSINESS STRATEGY

Ed has over 35 years of experience in developing, operating and investing in startup companies. He has extensive experience in fund raising and secured over \$55,000,000 in private equity for a company he previously founded.



Emily O.

BUSINESS STRATEGY

Emily is an innovative problem solver, analytical thinker, and efficient executor. A seasoned professional in business strategy, corporate finance, and operations, Emily has a breadth of experience working across nearly all business verticals. Currently, as CEO & Founder of Guardian Biosciences LLC, Emily has experiences building businesses from the ground up and knows what it takes to get things done.



Joan H.

BUSINESS STRATEGY

Joan brings a unique mix of corporate consulting, academic, and non-profit experience.

- 7 years as a President/Advisor/Chief of Staff/COO for two multi-city non-profit organizations,
- 14 years as a tenured professor in business and information systems,
- 12 years as a consultant in corporate business and systems.

Our highly qualified experts can immediately **impact** your organization.



Olivier K.

BUSINESS STRATEGY

Olivier brings over 25 years of executive management experience as a leader and analytical thinker in a multitude of industry sectors such as media and entertainment, marketing and advertising, technology and SaaS, and consumer goods. He is passionate about developing and deploying disruptive and innovative business concepts.



Amy R.

BUSINESS STRATEGY

People and Connection is the secret sauce to any successful business or professional. Connection inspires action. Amy has a passion for the art of communication skills and sales techniques within business. She likes getting people excited about what she is excited about. Building a successful business with relationship selling.



Sarabeth B.

BUSINESS STRATEGY

Dr. Sarabeth is a trusted senior level innovation strategist, published author, TEDx speaker, and program leader with 15 years driving initiatives that transform systems, culture, and human experiences for startups, nonprofits, higher education, K-12, and foundations.

Simone R.

DEI

Simone's upbringing instilled in her a strong sense of the importance of community, family, and building through investing in the success and dreams of one another. At an early age Simone realized the reality of societal disparities in marginalized communities. Because of this she drives to raise awareness and find solutions to alleviate these inequities. Simone is passionate about building sustainable, empowered, educated, and safe communities.

In an effort to catalyze change, and elevate equity of opportunity in work, Simone founded Simone D. Ross, LLC, a consulting firm with the vision of catalyzing human thriving through effective and integrative change management. Simone uses her 15+ years of corporate experience to bring voice to the importance of creating equitable and sound business enterprises.



DEI

ARTIFICIAL INTELLIGENCE | BEHAVIORAL ECONOMICS | STRATEGIC PLANNING | DATA
SCIENCE | LEADERSHIP COACHING | DIVERSITY CONSULTING | CHANGE MANAGEMENT
| GENDER EQUITY | THOUGHT PARTNERSHIP

Our highly qualified experts can immediately **impact** your organization.



Paola B.

DEI

Paola is a cultural proficiency expert primarily focused on instructional design, organizational learning, community outreach, de-risking, corporate culture, and Diversity, Equity, Inclusion and Belonging (DEIB). An immigrant Latina from Mexico City, she moved to Colorado about six years ago and has lived in Manhattan, France, Spain etc.



Chelle J.

DEI

Chelle is a first-generation college graduate who grew up with limiting beliefs, fear, and dysfunction. Through faith, resilience, grit, and determination, she achieved executive leadership roles in Talent Acquisition and Human Resources at Fortune 50 companies including Comcast, Lockheed Martin, and Honeywell. She has lived and worked in Asia and Latin America, acquired her MBA, and speaks Spanish and English.

TOP TALENT ACROSS EVERY EXPERTISE.

Laurie G.

MARKETING

Laurie is a former New York City sex crimes and homicide prosecutor, television legal analyst, educator, and entrepreneur. As the owner of Tribeca Blue Consulting, she helps professionals communicate with clarity, confidence, and creativity in their public speaking, presentations, trial work, and media appearances.

Laurie is passionate about helping people present their ideas in creative and persuasive ways that engage their audiences. As a former trial lawyer and television legal analyst, she shares insider's tips and tricks from her experiences in front of judges, juries, and live television audiences to help her clients get the most out of their presentations and public speaking.

Laurie works with clients through keynote addresses, group training, and one-on-one coaching to develop their personal and professional narratives, craft the hooks that draw their audiences in, and curate the stories that keep them listening and wanting to learn more. This leads to more clarity and confidence in their communications and more attention and success for them and their businesses.



MARKETING

CMO | MARKETING STRATEGIES | BRAND STRATEGY | DIGITAL MARKETING |
SEO | SOCIAL MEDIA | EMAIL MARKETING | INFLUENCER MARKETING | BRAND
PARTNERSHIPS | THOUGHT LEADERSHIP | WEBSITE DESIGN | WEBSITE DEVELOPMENT





MARKETING



Leslie H.

MARKETING

With over two decades of experience in holistic brand management, Leslie is a trusted consultant with an invaluable capacity for ideation, research, strategy, planning. Leslie is passionate about the power of potential with a vision to make an impact in each of the 17 Sustainable Development Goals through her consulting work.



Julie E.

MARKETING

Julie has 20+ years of experience in various marketing, brand, and innovation roles at companies such as General Mills, Target, and Sports Authority. Over the course of her career, she has led turn-around strategies for large consumer brands, designed scrappy marketing plans for small under-resourced businesses, created new brands and relaunched other brands, worked cross-functionally within an R&D organization, and led teams through multiple challenging business climates.



Dave G.

MARKETING

Recognized multiple times as a successful entrepreneur and leader of one of the fastest-growing private companies by the Inc. 500/5000 list, Dave is an executive that understands what it takes to build strong organizations. As a Founder and CEO he has demonstrated the ability to combine vision with execution to produce results outperforming expectations.

Our highly qualified experts can immediately **impact** your organization.



Charles C.

MARKETING

Charles believes in practicing a design approach that is built on listening, creating empathy, and finding authentic solutions that clients and their audiences can connect with. He has previously served as Events Director and President of AIGA Colorado, and now serves on the Advisory Board.



Eliza P.

MARKETING

Eliza brings to Prall Marketing 30 years of experience as a place maker and community builder with a marketing communications approach. Her business mindset anchors her in-depth understanding of the power of branding, marketing, and creating strong sense of place.



Brooke B.

MARKETING

Brooke is a seasoned copywriter, editor, and content developer specializing in digital marketing and brand development. Deemed by clients and colleagues as a “wizard of words”, Brooke offers decades of experience managing communications and content development in a variety of settings—from startups to corporate to the United Nations.

Alana W.

PUBLIC RELATIONS

Alana has been a publicist for more than 20 years, providing dedicated personal attention, strategic relationships and impeccable results to her clients. She specializes in media relations in the areas of travel and hospitality, residential and commercial real estate, luxury, lifestyle and food and beverage. Alana's client experience includes Great Hall Partners, Ferrovial Airports, Continuum Partners, East West Partners, BMC Investments, The Lodge & Spa at Brush Creek Ranch, Hotel Born, Kimpton Hotels, Marriott hotels, Visit Denver, Town of Breckenridge, Exclusive Resorts and many more.

Prior to becoming an independent PR consultant in 2007, Alana served as Director of Account Services at a respected agency in Denver, where she led the luxury travel, real estate and hospitality team, spearheading campaigns for real estate developers, lifestyle travel clubs and hotel and hospitality clients around the world. Prior to moving to Denver in 2004, she was a publicist in New York City with Doubleday Broadway Books, a division of Random House, Inc., where she promoted travel, cookbook, sports and celebrity authors.



PUBLIC RELATIONS

COMMUNICATIONS SPECIALIST | CORPORATE COMMUNICATIONS | PR |
COMMUNITY RELATIONS | CRISIS MANAGEMENT | MEDIA RELATIONS





PUBLIC RELATIONS



Beth C.

PUBLIC RELATIONS

Beth's mission is to provide immediate brand positioning and marketing expertise to both new and established high-end specialty manufacturers in the outdoor, ski, sport and wellness industries.



Paul S.

PUBLIC RELATIONS

Paul provides expert media relations and publicity services. He has represented some of the leading and most respected companies in real estate, assisting them with publicity and overall media relations. He is personally responsible for generating hundreds of millions of dollar's worth of free publicity for clients, including placements in leading national media outlets.



Teresa D.

PUBLIC RELATIONS

Teresa is a talented consultant with nearly 20 years of experience in strategic communication, public relations and marketing communication. Accredited in Public Relations (APR) with an education and training in journalism, Teresa applies her background and passion for narrative to clients who wish to tell their stories and manage their communication with their publics.



Hilary G.

NONPROFIT

Hilary has 13+ years of experience as a highly collaborative and adaptive change agent. An accomplished problem-solver, Hilary excels at helping take on the identity, planning, and execution challenges and opportunities that face individuals and teams as they reflect on the present and look to their desired future. Hilary helps clients successfully navigate critical junctures and sensitive initiatives; embody authentic culture and shared commitment; and cultivate effective relationships in service of meaningful growth and performance. Her approach incorporates fun and learning wherever possible.

Hilary was most recently the co-owner and Chief People Officer of Rebound Solutions where she was responsible for people- and culture-related leadership and operations while simultaneously supporting dozens of client engagements. Hilary has demonstrated success in efforts that include nonprofit Board facilitation and succession planning, program implementation, change management, team building, and coaching. Hilary has also held roles in management consulting, consumer insights and strategy, and business development training.



NONPROFIT

EXECUTIVE DIRECTOR | INTERIM EXECUTIVE DIRECTOR | STRATEGIC PLANNING |
NONPROFIT DEVELOPMENT | FUNDRAISING CONSULTANT | FUNDRAISING STRATEGIES |
FEASIBILITY STUDY | CAPITAL CAMPAIGN PLAN | MAJOR GIFTS OFFICER





NONPROFIT



Robin A.

NONPROFIT

Robin is a non-profit consultant with over 15 years of experience working with non-profits, social enterprises, and private organizations in diverse capacities. Robin has worked as a corporate consultant, educator, project manager, program director, volunteer coordinator, and psychotherapist, and uses this breadth and depth of experience to inform her work.



Jessica B.

NONPROFIT

Jessica is a philanthropic strategist with a passion for creating social change. She has extensive experience working with family foundations and individual philanthropists, designing grant programs and strategic initiatives to achieve greater impact in the community.



Kerri D.

NONPROFIT

Kerri is a nonprofit consultant and strategist who brings over 20 years' experience guiding, supporting and empowering diverse stakeholders to develop and achieve shared goals. Her specialties include training and facilitation, governance, strategic planning, conflict resolution and grant writing.

Our highly qualified experts can immediately **impact** your organization.



Alison M.

NONPROFIT

Alison has 15+ years of experience bringing her creative and innovative vision to non profit management, strategic planning, arts and culture, and community engagement. Alison has overseen over \$8 million in successful capital and donor campaigns, built non profit boards from the ground up, and worked on major branded content campaigns around the country.



Emily C.

NONPROFIT

Emily began her career at Planned Parenthood working to advance health policies, writing press briefs, and engaging grassroots and high-level stakeholders in public health advocacy successfully organizing diverse groups toward a common goal.



Dorota J.

NONPROFIT

With 20+ years of experience in relationship building, six years in policy, and four years in sales, Dorota brings a unique perspective and holistic approach to each engagement she undertakes. Dorota has proven success in creating and executing strategic plans, project management, client relations, policy, and analysis. She has a passion for coalition building, community relations, and creating positive movements.

Jorie C.

HUMAN RESOURCES

Jorie collaborates with HR Managers and/or Organizational Leadership around their “people pains” and develops a strategic plan to motivate and engage their employees. She leverages her understanding and knowledge of personality types and human behavior to help companies ensure their organizational goals are closely aligned with their people practices. When working with employees individually, she aims to identify relevant patterns and help people to connect the dots for lasting change. As an organizational consultant, she works to uncover the root cause of organizational challenges and design realistic interventions that move performance outcomes in a positive direction. Her passions include helping people and organizations align perceptions with intentions and seeing others happy in every aspect of their life. With her comprehensive understanding, collaborative approach to problem solving and results focused curiosity, her goal is to be a valuable resource dedicated to the success of others: both individuals and organizations



HUMAN RESOURCES

HUMAN RESOURCE DEVELOPMENT | HUMAN RESOURCES TRAINING | HR RESPONSIBILITIES |
EMPLOYEE BENEFITS | ORGANIZATIONAL CULTURE | SALES STRATEGY | MANAGEMENT TRAINING
PROGRAMS | COMPENSATION AND BENEFITS | ONBOARDING | TALENT ACQUISITION





HUMAN RESOURCES



Angie O.

HUMAN RESOURCES

Angie helps organizations thrive by providing a full range of services, including leadership coaching and culture identification. She relishes in soul-connections and authentic communication.



Derek J.

HUMAN RESOURCES


Derek has over 15 years of experience in People Talent, including acquisition, engagement, development, management, and retention. He is passionate about building scalable, inclusive institutional cultures where HR is a strategic advocate in today's global workforce.




Amanda Q.

HUMAN RESOURCES

Amanda is a trusted senior human resources business partner. Not only does she have a passion for people, but she understands the needs of an organization and is able to marry the two for long term success. She has spent the majority of her career within the Human Resources field and finds it not only rewarding, but also an exciting profession since it touches on so many areas within an organization.



Our highly qualified experts can immediately **impact** your organization.



We've been known to brag a bit about our network of experts. And when you work with them, we have a feeling you'll understand why. No matter the expertise your organization needs, they'll always be respected in their fields, vetted by us and ready to make an impact for you.



THE TALENT BOOK

[HTTPS://CANOPYADVISORY.COM](https://canopyadvisory.com)