

Haven Capital — Top 10 Hot List

Week of April 28, 2026

Priority outreach targets across all 4 COI channels. Call this week.

INTERNAL — DO NOT DISTRIBUTE

10

PRIORITY TARGETS

7

WARM PATHS

4

CHANNELS

1

TIME-SENSITIVE

1

Lane Rhodes

TIME-SENSITIVE

FirstBank (TN) — Director, Government Guaranteed Lending

Just hired April 2026 to build FirstBank's entire SBA program. Former Live Oak VP. Building referral partnerships RIGHT NOW. First-mover advantage — Haven should be one of his first calls.

SBA LENDER

Owner: Jason + John

Call Monday 8 AM

2

William Frazier

STORE PATH

Live Oak Bank — SVP, Veterinary & Medical Financing

26 years vet/medical lending. THE senior vet/medical lender in the country. Every vet group that outgrows SBA passes through his desk. One relationship = sustained referral pipeline.

SBA LENDER

Owner: Greg

Email Monday (Greg signs)

3

April Mason

WARM PATH

Burr & Forman — Birmingham Office Managing Partner

Franchise Times Legal Eagle 6 consecutive years. Restaurant and fitness franchise M&A. Most decorated franchise attorney in Alabama. Her practice generates operators in Haven's buy box.

ATTORNEY

Owner: Greg

Email Tuesday (Greg signs)

4

Isaiah Harf

STORE PATH

Northmarq — Co-Leader, National Net Lease Group

Midwest CRE Hall of Fame. \$500M+ in net-leased healthcare. Runs sale-leaseback programs for fast-food retailers. If Haven wants to be a known buyer in NNN healthcare/QSR, Harf is a key relationship.

BROKER

Owner: Greg

Email Tuesday (Greg signs)

5

Greig Davis

CPA / ADVISOR

Dental ROI Associates — Nashville

30 years dental CPA. 1,000+ dental practice relationships. Former CFO for PE-backed dental roll-up. Even 5% in Haven's growth stage = 50 potential referrals. Speaks the CPA language: ROE, OpCo/PropCo, exit multiples.

Owner: Jason + John

Email Wednesday

6

Jennifer Anello

CRE615

CBRE — Nashville, Retail Tenant Rep

Former Director of Real Estate at Planet Fitness (US + Mexico/Central America). Prior corporate RE for Panda Express, Starbucks. Now placing those exact tenants as a broker. Haven funds the builds she's trying to place.

BROKER

Owner: Jason

Email Wednesday

7

Curt Anes

CARR — Nashville, Regional Director

Nation's largest healthcare tenant/buyer rep firm. 10,000+ transactions. Every dentist, vet, and physician looking for space in Tennessee goes through CARR. One relationship = systematic deal flow.

BROKER

Owner: Jason

Email Thursday

8

Daniel Crosby

VERIFY PINNACLE

Pinnacle Financial Partners — Director of SBA Lending

#1 SBA lender in TN by dollar volume (\$34M+ FY2025). Controls referral pipeline for ALL Pinnacle SBA borrowers. One relationship = institutional-level deal flow. Check if Haven/BlueSky banks at Pinnacle.

SBA LENDER

Owner: John + Greg

Email Thursday (Greg signs)

9

Dena Jalbert

Align Business Advisory — Nashville / Winter Park

\$3B+ in healthcare M&A. Top 25 Women in Mid-Market M&A. Serves \$10M-\$200M healthcare and industrial services companies. Her M&A clients need new locations post-acquisition. That's Haven.

CPA / ADVISOR

Owner: Jason + John

Email Friday

10

David Plummer

STORE PATH

Retail Specialists — SVP, Southeast

GlobeSt 50 Under 40. Represents Heartland Dental, Dave & Busters, Krispy Kreme, Fresenius Medical, AutoZone across every Haven target market in the SE. \$100M+ in transactions.

BROKER

Owner: Jason

Email Friday