

Madison Insurance Group Announces Keynote and Speaker Lineup for 2025 Annual Conference in Puerto Rico

Industry leaders in tax strategy, wealth management, and business growth unite to share insights, with a renewed commitment to giving back to Puerto Rico.

SAN JUAN , PUERTO RICO, November 6, 2025

/EINPresswire.com/ -- [Madison Insurance Group](#) (MIG) today announced the official keynote and speaker lineup for its [2025 Annual Conference](#), taking place November 13–16 in San Juan, Puerto Rico. The annual gathering brings together top experts in tax strategy, wealth management, and business growth to explore innovative approaches to financial sustainability and long-term success.



Keynote speaker George Sandmann, founder and CEO of [Growth-Drive](#) and author of *The Growth-Driving Advisor* (Forbes Books), will headline the program with a keynote address on “The Three Dimensions of Business Growth.” Sandmann’s proprietary framework helps business owners and advisors build strategic capacity, drive predictable profits, and create enduring enterprise value.

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This is where expertise meets purpose — helping business owners protect what they’ve built through sound risk strategy, collaboration, and Puerto Rico’s unique advantages.”
Mark Sims, President Madison Insurance Group

“Intentional business growth—designed and executed strategically—is proven to deliver best-in-class results,” said George Sandmann, Founder and CEO of Growth-Drive. “When leaders expand their strategic capacity across all three dimensions of growth, they build a business engine that runs easier and produces predictable, sustainable profits and value. That’s exactly what private capital markets seek and reward—and it benefits shareholders, employees, stakeholders, and the communities they serve. Together we are on a mission to help \$1 Trillion of private

businesses do exactly this.”

Featured Speakers:

- Aran Quinn, Managing Attorney, Quinn Global Tax Law – Tax Implications and Legal Strategy
- Garrett Gregory, Co-Founder, Gregory Law Group, PLLC – IRS Representation and Tax Defense
- Doug Dickey, Principal, DRDA, LLC – Income Tax Optimization and Risk Management
- Michael Parise, Copper Beech Financial Group – Advanced Wealth Transfer and Family Governance
- Ashley Tison, Founder, OZ Pros – Opportunity Zone Innovation and Implementation
- Phil Wilson, Managing Director, CBIZ – IRS Tax Controversy and Resolution
- George Sandmann, Founder & CEO, Growth-Drive – Keynote: The Three Dimensions of Business Growth

“Madison’s conference brings together trusted advisors and forward-thinking leaders,” said Mark Sims, President of Madison Insurance Group. “Our mission extends beyond financial success. We deeply care about the people and communities that make our work possible, and Puerto Rico has been an inspiring partner in that journey.”

This year’s agenda features expert panels, client success showcases, and networking events, complemented by excursions through Puerto Rico’s rainforest and coastal waterways.

New for 2025, Madison is introducing a philanthropic component that enables attendees to contribute directly to local nonprofits, supporting community initiatives and sustainable development across Puerto Rico.

Speakers



Aran Quinn (Quinn Global Tax Law)

Aran is a licensed certified public accountant and tax attorney with over 10 years of experience in transactional tax planning, tax compliance, and tax controversy. He is the managing attorney at Quinn Global Tax Law, a boutique law firm specializing in domestic and international tax law and asset protection. Aran and his team provide custom-tailored solutions by using novel financial instruments and innovative processes specific to each client. With his expertise and dual licensure, Aran works with his clients to think differently to uncover new financial paths that don't result in the most tax being due.

Aran received his undergraduate degree in accounting from DePaul University in Chicago, his Juris Doctor degree from Chicago-Kent College of Law, and his masters of laws from Georgetown University. He represents his clients before the US Internal Revenue Service, the US tax court, all state departments of revenue, and in the highest courts of both Illinois and Nevada. Aran has offices in both Las Vegas and the Chicago area, serving clients domestically and abroad.



Garret Gregory (Gregory Law Group, PLLC)

Mr. Gregory received a Bachelor of Sciences (Business-Insurance) degree from the Pennsylvania State University in May 1994. Mr. Gregory received a Juris Doctor from South Texas College of Law in May 1999. Mr. Gregory then attended the Boston University College of Law and received a Master of Laws in taxation in May 2000.

Also in 2000, Mr. Gregory accepted a position as an International Tax Services Associate with Rinewaterhouse Cooper in San Jose, California where he worked from June 2000 through May of 2003. The primary focus of Mr. Gregory's practice during this time was advising major domestic and foreign companies on the domestic and international tax consequences associated with various structures and transactions.

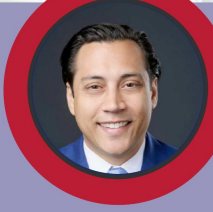
Beginning in June 2003 Mr. Gregory accepted a position as a senior attorney with the Office of Chief Counsel (IRS) in the National Office International Branch 5 (International Financial Institutions and Products) in Washington, D.C. In this position Mr. Gregory provided support to field attorneys and revenue agents with respect to identifying and developing issues associated with the domestic and international tax treatment of various structures and financial instruments. Additionally, Mr. Gregory drafted U.S. Treasury Regulations, Field Service Advice, Revenue Procedures, and other similar IRS advisory documents.

In 2005 Mr. Gregory transferred within the Office of Chief Counsel (IRS) to the Dallas, Texas field office. In this capacity Mr. Gregory served as a Senior Attorney within the Large Business and International group where he provided audit support to IRS Examination and litigated cases in U.S. Tax Court. Additionally, Mr. Gregory served as the Industry Coordinator for S Corporations and served as a member of the International Field Counsel.

In 2014, Mr. Gregory left the Office of Chief Counsel (IRS) and co-founded Gregory Law Group, PLLC where he is currently a member. Since 2014 Mr. Gregory has worked on numerous tax cases including the audit, appeals, litigation, and collections aspects of these cases. Additionally, Mr. Gregory has prepared tax opinions rendering opinions on various tax aspects of business structures and financial products.

Madison Insurance Group 2025 Conference Speakers

Speakers



Michael Parise (Copper Beech Financial Group, LLC)

Michael has been guiding ultra-high net worth enterprising families and privately held business owners for over fifteen years. Michael specializes in the design, structure, and implementation of advanced wealth transfer and governance plans for the ultra-high net worth families of Copper Beech's Family CFO platform, delivering custom-tailored solutions that meet the family's generational wealth goals while maintaining intergenerational family harmony. His work with families goes beyond simply the quantitative aspects of wealth, incorporating a truly holistic approach to family wealth advising.

Michael received his undergraduate degree in Ecology, Evolution, and Natural Resources from Rutgers University, and his Juris Doctor degree from Rutgers Law School, Camden. He is also a member of the New Jersey and Pennsylvania Bars.



Ashley Tison (OZ Pros)

Ashley Tison is an attorney, professional speaker, and the Founder of OZ Pros - A full service Opportunity Zone advisory firm. Ashley has worked in real estate, mergers & acquisitions, business growth and management. He brings his breadth of experience in all of these areas to help educate and guide investors to navigate Opportunity Zones.

Graduated magna cum laude from UNC Charlotte and UNC Chapel Hill School of Law, he has built a team uniquely positioned to handle the acquisition and securities, real estate, and tax nuances that are inherent in Opportunity Zone deals. Passionate about helping ALL business owners learn to harness the value of Opportunity Zones, Mr. Tison has become a highly sought-after expert nationally and brings perspective as an entrepreneur, investor, and consultant to the Opportunity Zones space.



Doug Dickey (DRDA, LLC)

With the exception of a short period as a controller for an SEC Registered Investment Advisory Firm, Mr. Dickey has been in public accounting since 1979. He is currently a member and principal of DRDA, PLLC, Certified Public Accountants. As a graduate of Sam Houston State, Mr. Dickey is a member of many relevant organizations such as the Exit Planning Institute, American Institute of Certified Public Accountants, and the International Business Brokers Association. Mr. Dickey is a frequent speaker on topics ranging from tax compliance, tax planning, estate planning, asset protection, business formation, structuring, start-up financing, growth, and profit optimization as well as exit planning. Among many concentrations, Mr. Dickey's practice focuses on small and middle market companies and supporting the pursuits of the entrepreneur.

Madison Insurance Group 2025 Conference Speakers Continued

For the full agenda and registration details, click
2025 Annual Conference or visit us at:
www.madisoninsgroup.com/conference2025

About Madison Insurance Group:

Madison Insurance Group is a leader in enterprise risk management and alternative insurance solutions, specializing in insuring business revenue and mitigating financial disruptions. With a focus on protecting against catastrophic risks and optimizing financial strategies, Madison Insurance Group helps business owners safeguard their future while maximizing financial efficiency. For more information, visit online at www.madisoninsurancegroup.org

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Speakers



Phil Wilson (CBIZ)

Phil is a managing director in CBIZ's Costa Mesa, California office and is a member of the organization's national Tax Controversy group. He has more than 30 years of CPA and business advisory experience, including experience as an IRS revenue agent.

Phil focuses on helping individuals and companies resolve tax controversies with the Internal Revenue Service, representing all types of businesses as well as high net worth individuals.

Prior to CBIZ's acquisition of Marcum LLP in November 2024, Phil served as an office managing partner at Marcum for over ten years. Before joining Marcum, Phil was a founding partner of WilsonMorgan LLP, based in Irvine. He oversaw all of the firm's tax compliance, tax consulting, and tax controversy engagements. He has substantial experience in the real estate area, including tax structuring for commercial and residential developers, and has worked with clients in a wide variety of industries.

George Sandmann (Growth-Drive)

George Sandmann is a visionary leader in the private capital markets and the creator of the Three Dimensions of Business Growth methodology. As the founder and CEO of Growth-Drive, George leverages over three decades as an entrepreneur helping business advisors and their clients transform closely held companies into best-in-class competitors. His pioneering work equips advisors to guide CEOs in creating predictable profits, sustainable growth, and maximized transferable value.

An attorney-turned entrepreneur, George has collaborated with thousands of business advisors across the country, shaping a practical system that elevates operational clarity and execution. His book, *The Growth-Driving Advisor* (Forbes Books 2023) is a blueprint for converting analysis into action—and for turning intent into outcomes that matter.

George's personal vision is bold: to increase the strategic capacity of \$1 trillion worth of private businesses. He believes that Strategic Capacity—a business's ability to predictably and sustainably grow free cash flow—is the true driver of business value. By redefining how businesses prepare for and execute growth and liquidity, George's work is reshaping the way families preserve wealth and how private equity players evaluate and price opportunity.





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Madison Insurance Group 2025 Conference Speakers Including Keynote Speaker George Sandmann, Founder & CEO of Growth-Drive



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MIG Puerto Rico Conference 2025

November 13-16

THU • Opening Cocktail Reception
6:00 PM - 8 PM

FRI • Breakfast
8:00 AM - 9:00 AM
Opening Remarks (Mark Sims)
9:00 AM - 9:15 AM
The Madison Program/New Product Offerings (Mark Sims)
9:15 AM - 10:15 AM
Tax Implications (Aran Quinn)
10:15 AM - 11:15 AM
Updates From Madison Staff
11:15 AM - 11:45 AM
Lunch
11:45 AM - 12:45 PM
Poolside Networking Event
5:00 PM - 7:00 PM

SAT • Breakfast
8:00 AM - 9:00 AM
Expert Panelist Think Tank
9:00 AM - 10:00 AM
Client Success Stories
10:00 AM - 10:15 AM
Keynote Speaker (George Sandman)
10:15 AM - 11:00 AM
Bus Departures for Rainforest and Boat Excursions (Takeaway lunches provided by Hotel)
11:50/11:45 AM
Poolside Excursion
12:00 PM

Reminder: excursions are selected upon registration. Our rainforest zipline excursion will return around 6:30, and our boat excursion will return around 7:00. Those who selected to remain at hotel, the poolside event will begin at 12:00 PM. Please see Joe Majhess to confirm your excursion (jmajhess@madisoninsurancegroup.org)

SUN • Travel Home

Madison Insurance Group 2025 Conference Agenda

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