

The background of the entire page is a repeating pattern of avocados. Some are sliced in half, showing the green flesh and brown pit, while others are whole, showing their dark green, bumpy skin. The avocados are set against a solid purple background. The text is overlaid on a green rectangular area in the upper half of the page.

# Naturally

**BAY AREA  
SUPPLIER GUIDE**

AN OVERVIEW OF SERVICE PROVIDERS WHO SUPPORT OUR COMMUNITY | 2024



## DEAR NBA MEMBERS & FRIENDS,

Naturally Bay Area was founded in 2018 as a 501(c)6 nonprofit and the first Naturally Network Affiliate.

We seek to galvanize and grow the natural and organic products industry by connecting entrepreneurs, investors and innovators through networking, mentorship, education and collaboration.

We could not foster this community without the support of our partners, nearly  $\frac{3}{4}$  of whom are service providers for the natural products industry.

Many of our partners are board members and other volunteers who also put in countless volunteer hours to make our community stronger.

We hope you will enjoy learning more about the organizations that are dedicated to helping our Bay Area natural products community thrive.

In Appreciation,

### DREW MCGOWEN

NBA Board Chair

### MONIQUE LLAMAS

Director of Partnerships & Programming





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## Partnering to create opportunities

Bank of America continues to invest in our communities to help create jobs and fuel economic opportunity. Whether it's supporting local organizations like Naturally Bay Area or lending to small businesses and entrepreneurs, we're committed to keeping the Bay Area healthy, strong and connected.

To learn more, visit us at [bankofamerica.com/about](https://bankofamerica.com/about)

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**BANK OF AMERICA** 



# Where Insight Nurtures Innovation

Specialty food and natural product companies thrive when their financial health is nurtured. Whether supporting traditional tax, R&D tax and audit, providing bookkeeping and back office accounting services, BPM pairs innovative information with decades of experience and industry insights to help companies craft a healthy financial future.



**Ryan Musser**  
Consumer Products  
Industry Leader  
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# BPM

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[bpmcpa.com/nba](http://bpmcpa.com/nba)



**DAVIS WRIGHT TREMAINE** (DWT) is a 550+ attorney national law firm with a deep commitment to the food, beverage and the natural products industries. DWT has one of the largest food & beverage industry practices in the country, with over 40 attorneys who represent food innovators, entrepreneurs and investors at every level of the food chain, from Farm to Label. Our clients are “seed” (0-\$2mm annual revenue), “scaling” (\$2mm-\$20mm), and “seasoned” (\$20mm - \$1bn) food and beverage brands and the investors who fund them in all of the major food innovation hubs in the United States, including the San Francisco Bay Area, Boulder, Brooklyn, Austin, Chicago, Los Angeles, Seattle and Portland. To support the industry, DWT attorneys have assumed leadership roles in Naturally Bay Area, Nutrition Capital Network, the Culinary Institute of America’s Food Business School, and OSC2, a community of sustainability-focused food industry business leaders. DWT is proud to be a Founding Sponsor of Naturally Bay Area.



**Contact information:**

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Baker Botts is a globally respected law firm with offices around the world. We provide a deep understanding of a broad range of issues, including many of the largest, most complex matters facing our clients. Manufacturers, distributors, and retail sellers of consumer goods and services, from traditional stores to global e-commerce businesses, turn to us for our experience and reputation. Because we take the time to know you, your business, and your industry, we deliver high-value, high-quality services that respond to the ever-changing demands of today's business world.

We proudly support Naturally Bay Area in its mission to stimulate growth, entrepreneurship, and exceptional leadership, foster sustainable and responsible best practices, and facilitate collaboration and mutual support among members.

**Cheryl A. Cauley**

Partner  
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**BAKER BOTTS**

## BRAUNHAGEY & BORDEN LLP

San Francisco | New York

BraunHagey & Borden represents emerging, high-growth companies and the venture capital and private equity funds who back them. Our clients are market leaders throughout the consumer sectors, spanning food & beverage, technology, beauty & personal care, health & wellness and sustainability.

With a business-first approach, we lead companies and investors through hundreds of financing and sale transactions annually, totaling billions of dollars in transaction value, in addition to advising on complex trademark and commercial matters and high stakes CPG litigation.

### PRACTICE AREAS

Equity & Debt Financings | Mergers & Acquisitions | Tax | Recapitalizations & Restructuring  
Fund Formation & Compliance | Corporate Formations & Governance | IP & Brand Protection | Commercial Transactions

### REPRESENTATIVE CLIENTS



**Allison Hagey**  
Partner & Head of IP  
allison@braunhagey.com

[www.braunhagey.com](http://www.braunhagey.com)

**Dan Harris**  
Partner & Head of Corporate Practice  
Director, Naturally Bay Area Board  
harris@braunhagey.com





## The Burbank Group

MORGAN STANLEY  
PRIVATE WEALTH MANAGEMENT

We are proud  
supporters  
of  
Naturally  
Bay Area

Suzy Shin, Wealth Management Associate | Cate Rachford, Senior VP Group Director | Oscar Castillo, Portfolio Associate  
Private Wealth Advisors: Willis Davis, CFA, Senior VP; Mike Burbank, CIMA®, CFP®, Managing Director; Scott Hafeli, CFA, Executive Director | Wes Cai, Wealth Management Analyst

The Burbank Group at Morgan Stanley Private Wealth Management has focused on helping food, beverage, and consumer products entrepreneurs prepare for success and manage their financial lives for over 30 years. As of April 2024, The Burbank Group manages over \$3.25 billion.

**The Burbank Group | [mike.burbank@morganstanleypwm.com](mailto:mike.burbank@morganstanleypwm.com) | 415.576.2052**

Morgan Stanley Private Wealth Management, a division of Morgan Stanley Smith Barney LLC. Member SIPC.



# UPWARD

ACCOUNTING - CONSULTING - WEALTH MANAGEMENT

To look forward and rise to the challenges ahead requires welcoming change with optimism. It's how Moss Adams uplifts more than 740 food and beverage businesses to strategically plan for, and go, where they want to be next. Discover how our advisory solutions can help elevate your performance.

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MOSSADAMS

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Because You're Different

"Heffernan is very knowledgeable, responsive, timely, and proactive in helping us to manage our business risk."

— Edgar Estonina, COO & CFO, Armanino Foods of Distinction, Inc.

"I am confident in the Heffernan team providing counsel to help me make informed decisions. I consider Heffernan to be one of my company's integral partners."

— Thomas Garrity, General Counsel and CFO, Fra' Mani Handcrafted Foods

### INSURANCE OFFERINGS

- Business Insurance
- Financial Services
- Employee Benefits
- Personal Insurance
- Alternative Risk

### CONSULTATIVE SERVICES

- Claims
- Loss Control
- HR Consulting
- Reps & Warranties
- Risk Management Assessments

### SPECIALIZING IN CPG

Balance is key. We make sure your business is protected while controlling costs. Our Risk Management Assessment helps you right size your insurance program and roadmap a plan to address relevant risks as your business scales.

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parabolic

# Ideas with trajectory

HARNESSING DECADES OF CPG EXPERIENCE TO HELP BRANDS SELL IN & SELL THROUGH AT RETAIL.

INSIGHTS-BASED CREATIVE CONCEPTS

SHOPPER MARKETING ANNUAL PLANNING

INNOVATIVE OMNI-CHANNEL ACTIVATIONS

ENGAGING RETAILER PRESENTATIONS & TRADE SHOW BOOTHS

PROUDLY HELPING NATURAL BRANDS GROW

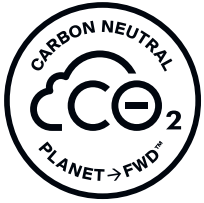


Mary Tarczynski, Principal, Client Solutions Lead | mary@parabolicagency.com | 510.220.5301

# PLANET → FWD®

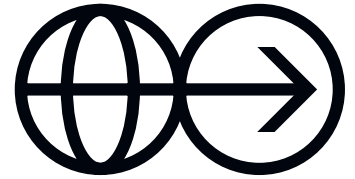
60% OF GLOBAL EMISSIONS COME FROM CONSUMER PRODUCTS. TOGETHER, WE CAN TACKLE THAT.

MEASURE > REDUCE > GO NEUTRAL > REAL ZERO



JOIN THESE BRANDS ON THE PATH TO NET ZERO.

just salad



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## PROPELLER INDUSTRIES

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### Our Services



CFO-LEVEL FINANCIAL STRATEGY & GUIDANCE



FINANCIAL PLANNING & ANALYSIS



PROFESSIONALIZED ACCOUNTING



CIO SERVICES



TRANSACTION ADVISORY

800+

START-UP CLIENTS SERVED ACROSS VERTICALS

15

YEARS OF EXPERIENCE WITH STARTUPS

\$50B+

VALUE WE'VE HELPED CREATE

20

CFOS ON STAFF WITH >20 YEARS AVG EXPERIENCE

350

FULL-TIME STAFF (NO CONTRACTORS)

A Few of our 100+ CPG Clients:





**S2G Ventures** partners with entrepreneurs who are working on solutions to some of the world's greatest challenges across the food, agriculture, oceans, and energy markets. We provide capital, mentorship, and value-added resources to companies pursuing innovative market-based solutions that generate positive social, environmental, and financial returns.

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a Builders Vision team



## Baker Tilly is proud to support Naturally Bay Area



Understanding and managing growth, reducing risk throughout the supply chain, and acting as a Valued Business Advisor throughout the growth process is what we offer our clients.



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# BEDROCK

Competition for shelf space is more intense than real estate. CPGs in over 160 categories leverage Bedrock to win.

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\*Upon artwork approval.

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No plate fees

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[@epacflexiblepackaging](https://www.instagram.com/epacflexiblepackaging)

## NIQ

As a natural brand, you know product formulas are important. *But what about brand formulas?*

You need the right formula to grow your brand

### The Formula for Growth



1000+ channel coverage including Whole Foods Market, Good Food Holdings, Amazon, and e-commerce.



1500+ product attribute tracking including stated, qualified, and our new Better For Segment™



Accurate, robust panel and omnichannel data, delivering the Full View™ of consumer buying behavior

See the latest industry insights, get expert guidance on today's turbulent market, or schedule a 1:1 consultation to identify growth opportunities, all without breaking the bank.



# MISTA

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OMNIUM

## BUSINESS QUESTIONS DEMAND DATA-DRIVEN SOLUTIONS

### REVENUE GROWTH MANAGEMENT

OmniUM pairs applied mathematics and data science with extensive industry experience to deliver **best in class retail account planning, price pack architecture, trade spend management, reporting and optimization.**

#### RETAIL ROADMAP™

Multi-year plan for emerging brands with forecast & P&L by channel

#### SALES & OPERATIONS PLANNING

Understand costs & uncover ops to improve margin

#### SALES TALENT SOLUTIONS

Seasoned leadership & development for emerging CPG brands

CURRENT NATURAL CLIENTS INCLUDE



JOHNNY VALERIOTE, PRESIDENT & CEO

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RSF Social Finance works at the intersection of social change and finance, enabling investors and donors to align their money with their values, and connecting entrepreneurs with mission-aligned funding.

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**SPINS  
LAUNCHPAD**

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Navigate growth stages  
with confidence.

SPINS Small Business Liftoff Bundle



Proven with 1000s of brands, the SPINS Small Business Liftoff Bundle is a high-value data and application suite for emerging brands that includes everything you need to accelerate your growth in today's dynamic retail environment.

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**TIG**  
Brands

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**We Build Nimble, Capital Efficient,  
Resilient Brands That Scale  
"Tardigrades, Not Unicorns"**

# Take your brand to the next level

When it's time to unlock the full potential of your business, Trinity is a small(ish) brand and communications strategy, design, and activation agency that's been helping big brands – and brands with big plans – win for 20 years.

Remember, every touchpoint represents the investment you're making in your brand... reach out and we can help you leverage every opportunity.

**Trinity**  
BRAND GROUP

matthew.youngblood@trinitybrandgroup.com

www.trinitybrandgroup.com

Trinity has been a proud sponsor of Naturally Bay Area from day one.



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SUPPLY CHAIN MANAGEMENT

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**LET'S TALK!**

## NATURALLY BAY AREA SIGNATURE PROGRAMS



### PITCH SLAM

Our keystone event of the year! Entrepreneurs will take the stage to pitch their brand to the community and a chance to win BIG.



### RETAIL ACCESS

Hosted retail pitch events to connect Bay Area emerging brands with sought after retail buyers.



### LEADERSHIP NETWORKING FORUMS

Peer networking groups connecting professionals in similar roles – CEOs & Founders, or Sales & Marketing.



### EDUCATION & NETWORKING

Monthly online panels on hot topics and quarterly in person networking events.

**JOIN US IN PROVIDING UNPARALLELED NETWORKING, CUTTING-EDGE INSIGHTS, & OPPORTUNITIES TO LEARN FROM INDUSTRY EXPERTS TO OUR 2500+ COMMUNITY MEMBERS. TOGETHER, WE'RE CHANGING OUR INDUSTRY FOR GOOD.**



# THANK YOU NATURALLY BAY AREA PARTNERS!



## PREMIER - \$10K



## GOLD - \$5K



## SILVER - \$2.5K



## COMPANY MEMBERS

