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USCAS AGENDA

Moderator: To be confirmed

8.30 Registration

9.00 Welcome Remarks

Panagiotis Panagopoulos, CEO & Founder, Aeropodium

9.10 **Topic TBC**

Jonathan A. Ewing, Esq., Founding Partner, Aero Law Center

9.40 **Part 135 – Legal Considerations for Purchase/Sale Transactions**

Forrest Owens, Esq., Principal, The Law Office of L. Forrest Owens

10.10 **The Outlook for Fractional Ownership in 2025 and Beyond**

Tom Chapman, Chief Experience Officer & Co-Founder, MyFlight Advisor

10.40 Topic TBC

William Herp, CEO, Linear Air

11.10 Networking Coffee Break

11.40 **Multi-Owner Structures: From Co-Owned to Fractional**

John Copley, Partner, Garofalo Goerlich Hainbach

12.10 Topic TBC

Joe Zulueta, ASA, President, Aeronautical Systems

12.40 **Augment your Part 135 Revenue Stream**

E. Terry Jaramillo, President & CEO, vonJet Aviation Group

13.10 Networking Lunch Break

14.30 **Things you Might not Know about International Operations**

Craig (C.A.) Southerland, Chairman, Premium Aviation

15.00 **Business Aviation and the IRS Examination Campaign**

Michael Kohner, Managing Director, Alvarez & Marsal Tax

15.30 **The Importance of Maintenance Records**

Larry Hinebaugh, Executive Director, Foundation for Business Aircraft Records Excellence

16.00 **The Talent Acquisition Landscape in Business Aviation Today**

Neil Engerran, Senior Aviation Recruitment Consultant

16.30 **100% Electric Cold Jet Propulsion: Enabling Long-Range eVTOL and Fixed-Wing Aviation Solutions**

Saul Tarazona, Co-Founder & CEO, eJet Aerospace

17.30 Concluding Remarks

SPEAKERS

Tom Chapman, Chief Experience Officer & Co-Founder, MyFlight Advisor

Tom Chapman's career in aviation includes more than 30 years of leadership experience involving proven business transformation and go-to-market strategies. During 12 years at Gulfstream Aerospace Corporation, Tom progressed through a variety of roles including new aircraft sales, and later, led marketing support, aircraft cabin completion sales and interior design for the company.

In his Gulfstream leadership role, Tom oversaw teams responsible for more than \$350 Million in annual revenue and successfully led a high-visibility project to reduce aircraft completion delays by focusing on major process improvement in aircraft sales, interior design, completion engineering, and production. He also served on Gulfstream's M&A executive team.

Later, Tom was recruited to Bombardier Aerospace's Flexjet division where he worked with ultra-high net worth individuals and C-level executives in the northeastern U.S. and Canada to structure solutions involving fractional ownership shares, jet cards, memberships, charter, and aircraft management. Tom has successfully worked with companies during their early growth stage by establishing their brands and products, including XOJET, and as Executive Vice President involved in the recent launch of Volato's HondaJet fractional ownership program.

Collectively, Tom has sold and participated in over \$1 Billion worth of aircraft transactions involving global corporations, private companies and government agencies in more than 20 countries.

Today, Tom is Vice President of Aircraft Management at Elevate Jet, a nationwide aircraft charter operator and aircraft sales team, that is a division of Miami-based Elevate Aviation Group, which includes charter broker Private Jet Services (PJS) and maintenance and AOG support by Elevate MRO.

Tom earned a Bachelor of Science degree in aviation administration from Embry-Riddle Aeronautical University in Daytona Beach, Florida, and continued graduate studies at both Embry-Riddle and Marymount University where he studied organizational management. He has also attended Harvard Business School's Young Presidents' Organization (YPO) Executive Program. Tom is a licensed pilot and trained at FlightSafety International for Hawker and Gulfstream business jets.

John Copley, Partner, Garofalo Goerlich Hainbach

John Copley is a principal in the firm of Garofalo Goerlich Hainbach PC (GGH). He specializes in both domestic and international aviation commercial transactions and regulatory processes and proceedings. John represents aircraft leasing companies, investment funds, aircraft owners, unmanned aerial vehicle owners and operators, on-demand air taxis, government contractors, public aircraft operators, aircraft management companies, fractional ownership program managers, aviation financiers, pilot schools and training centers, aircraft and parts manufacturers and repair stations. His practice is focused on sale, lease and acquisition transactions for both aircraft and aviation assets such as air carriers, parts manufacturers, and repair stations. In addition, John regularly provides regulatory advice for aircraft operations and compliance with regulatory licensing and citizenship requirements, including the operation of public, state, and civil aircraft.

John has published various articles covering aviation topics such as FAA jurisdiction over the operation of unmanned aerial vehicles, implication of regulatory changes regarding the operation of foreign civil aircraft, pre-purchase inspection liability, contractual consideration for repair stations, use of aircraft for charitable purposes, and simplified FAR Part 135 operations. He regularly lectures on topics related to aviation regulations and transactional

issues at regional and national forums including those sponsored by the National Business Aviation Association, Aeropodium, the Strategic Research Institute, and ALM.

John is a member of the tax committee of the National Business Aviation Association. He has also received recognition within the legal industry being named by ALM as one of Washington DC & Baltimore's Top Rated Lawyers

Prior to joining GGH, John worked as an attorney for the firm of Jackson & Jessup, PC. He earned a B.A., magna cum laude, from Wake Forest University. He received a DuPont Fellowship and his M.A. in Foreign Affairs and Government from the University of Virginia and his J.D. from the University of Virginia School of Law. John is admitted to the District of Columbia Bar and is an associate member of the Virginia State Bar. He is fluent in English and Spanish.

William Herp, CEO, Linear Air

Bill Herp is a serial entrepreneur and founder of three uniquely different startups during his career. He is currently founder and CEO of Linear Air, a company on a mission to revolutionize private air travel by making affordable air taxi service a reality.

Bill Herp founded Linear Air in 2004, spurred on by his passion for aviation as a private pilot. Initially conceived as an air charter business that would leverage a new class of low-cost "very light jets" (VLJs), his goal was to create a more affordable alternative for regional private jet travel. Along the way, the VLJ manufacturing model failed, and Bill was forced to re-invent his business. He re-launched Linear Air as the first "air taxi" marketplace, connecting small charter airplane operators throughout the U.S., Canada, and the Caribbean with regional travelers and giving them direct access to thousands of airports throughout North America. Now, in partnership with internet travel search sites such as Kayak, Amadeus and SABRE, Linear Air is making affordable private air travel a reality for more people than ever before. In addition to leading the business side of Linear Air, Bill continues to feed his flying passion as an ATP certificated pilot.

Bill received a BA from the University of Notre Dame and an MBA from Harvard Business School.

E. Terry Jaramillo, President & CEO, vonJet Aviation Group

E. Terry Jaramillo is the founder, President & CEO of vonJet ® Aviation Group, a company focused on mid- and end-of-life transport category aircraft engine leasing. Spanning nearly five decades, Mr. Jaramillo's involvement in aviation began in 1966, when he received his Private Pilot License through Tursair Flight School at Opa Locka Airport. In 1967 he received his instrument and multi-engine ratings, and in 1968 his Commercial Pilot License. In 1969 he formed Crown Aviation Corp. and Aero Service Associates, Inc., an FAA Part 135 Charter Operator, as well as earning a Douglas DC-3 type rating. In 1969, he earned his Airline Transport Pilot License, and was told by the FAA examiner that he was probably the youngest ATP on record, since he was six months shy of his 23rd birthday - all of this while attending the University of South Carolina and Miami-Dade College, and later FIU. He became Chief Pilot for Kentucky Fried Chicken of Florida, Inc., and later formed (owning 20%) Jareck Leasing & Financial Corp., a division of KFC of Florida, which he operated until he sold it to Southeast Bank in 1975. He was immediately hired by Southeast First Leasing to develop, among others, aviation leasing services. In 1968, Citicorp Leasing, Inc. recruited him, and later sent him to Citibank's CAU (Credit Analysis Unit) in New York. There, he obtained his credit initial and went on to manage large relationships for Citibank, e.g., Ryder System, Southeast Bank, etc. In 1973, he was recruited by Hugh McColl, then President of NCNB, later known as NationsBank and Bank of America, to become their first Corporate Lending Group Head in their first Miami office located in One Biscayne Tower. He continued in his banking career

after being recruited by Ensign Bank, a bank owned by Ted Arison (founder of Carnival Cruise Lines) and by Pacific National Bank, a bank owned by Banco del Pacifico in Ecuador (where he lived as a child).

After commercial banking, he moved into investment banking, where his entrepreneurial instincts could be better put to use, and the rewards substantially higher, without the inherent conflict of interest of being a bank credit officer approving deals. During that period, he became involved in many transactions overseas, including Chile, Brazil, Venezuela, Guatemala, France, Greece, Switzerland, Germany, Morocco, Poland, Hungary, Finland, Kazakhstan and Russia, all of which gave him a greatly broadened perspective on business. In 1999, he formed Capital Interfunding, Inc. to act as an Internet portal for various types of financing transactions. He put together a group and raised the financing to acquire a B737 “glider” from the estate of George E. Batchelor (Aerospace Finance Corp.) and re-engined it with “baby” JT8-Ds. After a number of other aviation-related financing assignments, in 2003, he formed Jet Aero Holdings, Inc. and Jet Aerospares, LLC together with very knowledgeable industry partners and began acquiring end-of-life aircraft (B747s / B767s) located at the Evergreen Air Center in Marana, Arizona with a view towards harvesting the engines (including APUs) and parting out the airframes. Engines were either sold or leased under “green time” leases, later parting them out, as well. All landing gear, components, control surfaces, etc. were placed on consignment with various parts houses. In 2007, he formed vonJet Advisors, Inc. and in 2008, vonJet Aviation Partners, Inc., which was intended to become an engine leasing fund. Due to the worldwide financial collapse in 2008, followed by the Great Recession, the fund concept was shelved. However, various transactions were completed with both internal and outside investor capital. Additionally, vonJet acted as aviation advisor to various individuals, companies and banks.

Mr. Jaramillo was a speaker in 2014 US-Africa Air Transport Summit on the subject of Funding Options, Investment Opportunities and the Role of Air Cargo in the Development of US-Africa Air Commerce and Trade.

In 2015, Mr. Jaramillo was a speaker at an AeroPodium conference on U.S. Aircraft Financing and Leasing, where he spoke on the subject of repossessing aircraft in default situations.

In 2016, Mr. Jaramillo was a speaker at an Everest Events Seminar on Aircraft Records & Asset Management.

Mr. Jaramillo was a speaker and is published in the American University International Law Review, Volume 13 | Issue 4, on the subject of Financing Sources for Trade & Investment in Latin America.

Forrest Owens, Esq., Principal, The Law Office of L. Forrest Owens

Forrest Owens spent his formative years in Indiana. Mr. Owens attended Vincennes University where he focused his studies on aviation technology and obtained Federal Aviation Administration (FAA) Airframe and Powerplant (A&P) as well as private pilot licenses, graduating with an A.S. in 1998. Mr. Owens subsequently attended Indiana University Kelley School of Business where he majored in Finance with a minor in Economics, completing a B.S. in 2001. During undergraduate study, Mr. Owens worked full-time for a leading aircraft turbine engine manufacturer based in Indianapolis as well as a regional airline and an internationally recognized aviation centered freight company. Mr. Owens attended law school at Valparaiso University where he graduated with a J.D. in 2005.

Before forming Aviation Legal Counsel, Mr. Owens spent over twelve years focused on aviation related legal matters with boutique practice groups. Mr. Owens has acted as counsel in the purchase and sale of hundreds of aircraft transactions ranging from experimental home-built aircraft to Gulfstream 550 aircraft. Mr. Owens has worked with every major manufacturer

of turbine powered corporate aircraft. Mr. Owens has also been involved in the merger and acquisition of many aviation related businesses.

Mr. Owens practice concentrates on aircraft and aviation related transactions, cross-border transactions, airman defense before the FAA and Department of Transportation, airport real estate and land use, and civil litigation. Mr. Owens has practiced as the principal of L. Forrest Owens, P.A. dba Aviation Legal Counsel (www.aviationlegalcounsel.com) since 2017. Mr. Owner is also of counsel to the firms of Saavedra|Goodwin and the Luxury Law Group.

Education

Vincennes University – Aviation Technology (A.S. 1998) (Technology Department Outstanding Alumni Award recipient 2005)

Indiana University Kelly School of Business (B.S. 2001)

Valparaiso University School of Law (J.D. 2005)

State Admissions

Indiana (Inactive), 2006

Illinois, 2008

Florida, 2007 (Board Certificated in Aviation Law 2017)

Aviation Industry Involvement

National Business Aviation Association

National Business Aviation Association – Regulatory Issues Advisory Group

South Florida Business Aviation Association, Treasurer

Florida Bar – Standing Member of the Aviation Law Committee

Aircraft Owners and Pilot Association – Panel Attorney

National Aircraft Finance Association

Florida Aircraft Business Association

Joseph Zulueta, ASA, President, Aeronautical Systems

Joseph T. (Joe) Zulueta, ASA, is an accredited senior aircraft appraiser designated by the American Society of Appraisers (ASA) and has been an independent aircraft appraiser, surveyor, and auditor specializing in corporate jet and turboprop aircraft for over 25 years. A U.S. licensed pilot, graduate of Trinity International University with a B.A., in Business Administration and has completed numerous post-graduate courses within the aviation and appraisal disciplines.

He is a Managing Partner of Aeronautical Systems, headquartered in Miami Lakes, Florida, serving the aviation industry worldwide since 1986. The firm specializes in aircraft consulting; prospective, current and prospective appraisals; damage event and diminution of value assessments; expert witness testimony to include pre-trial consulting through post-trial support; fractional aircraft ownership redemption consultation; major asset and portfolio management; and acquisition services on a diverse range of aircraft. The firm has appraised thousands of aircraft with an aggregate value totalling well over one billion dollars.

He is a guest lecturer and speaks on a broad range of aviation topics. First and foremost, he is a skilled aircraft appraiser. More broadly, he is a well-established expert witness in the assessment of diminution of value for damage aircraft events. He also has leadership responsibilities over aircraft asset and fleet portfolio management along with new and pre-owned acquisition services.

Mr. Zulueta analyzes and designs intra-company workflow processes, digital valuation tools, software integration models specific to the appraisal field and strives every day to produce and publish accurate, transparent and common-sense appraisal reports that the recipient will clearly understand.