



Northeast Private Equity Conference

January 24-25, 2019 | Lotte New York Palace | New York, NY

Agenda

Thursday, January 24

- 12:30 – 2:00 p.m. **Women Investors Networking Luncheon** *(Invitation only, please.)*
A special event for fund managers, limited partners and investment bankers who focus their investment activities in the Lower Middle Market.
- 3:00 p.m. **Conference Registration Opens**
- 3:30 – 4:30 p.m. **Portfolio Company Perspectives – Challenges and Opportunities**
Taxes, trade, hiring, sustainable growth ... what are the key issues facing your portfolio company management teams? This session will explore what keeps your CEOs up at night and what you, as their investor, can do to help.
Stacey Wittelsberger, Patriot Capital, Panel Moderator
Kären Olson, BalMed Group, LLC
Nellie Quintana, Fleetwood Fixtures/High Country Millwork
- 4:30 – 5:30 p.m. **Today's Investing Climate from the Limited Partners' Chair**
As the market continues its competitive path, what are your LPs thinking about as Q1 begins? A panel of active Limited Partners will share their observations about the investment climate and their expectations from their current GPs.
Justin Kaplan, Balance Point Capital, Panel Moderator
Carl Kopfinger, TD Bank, N.A.
Mortiz Poehl, Everside Capital Partners
Jonathan Wilson, Kemper Corporation
- 5:30 – 7:30 p.m. **Finding Deals and Building Networks Cocktail Reception**
The region's premier networking event for those active in the lower middle market. Meet with leading dealmakers who shape the future of our dynamic asset class.

Friday, January 25

- 7:30 a.m. **Conference Registration Opens**
- 7:45 – 9:00 a.m. **Networking Breakfast**
- 9:00 – 9:10 a.m. **Welcome and Sponsor Recognition**
The Northeast Private Equity Conference sets the tone and pace of the association's year. A warm welcome and special thanks to our sponsors from the regional president.
Justin Kaplan, Balance Point Capital, Northeast Region President
- 9:10 – 10:00 a.m. **The Washington Update**
A New Year, a new Congress. The mid-term elections are finally behind us, so what should professionals in the lower middle market expect? SBIA's President will review critical legislative and regulatory issues that may affect private equity investors.
Brett Palmer, President, Small Business Investor Alliance

2019 Northeast Private Equity Conference Agenda - Continued

- 10:00 – 11:00 a.m. **The Cost of Doing Business in the Year Ahead: An Economic Forecast**
Is private equity starting to bow under the weight of its own recent growth and success? Will 2019 present changes for this market segment or will competition force fund managers to get more creative, more specialized in their investment strategies? Our speaker will provide an economic foundation that will serve fund managers well as the New Year marches ahead.
Fotios Raptis, Senior International Economist, TD Economics
- 11:00 – 11:30 a.m. **Networking Refreshment Break**
- 11:30 – 12:30 p.m. **Keynote Presentation**
Lessons for Leadership for a New World
Our speaker has been involved in security operations in hostile environments for over ten years. His team's involvement with the September 11th, 2012 attack on the US special mission in Benghazi, Libya was paramount to the saving of US lives and assets. Kris will share how teamwork, preparation and fortitude gave his team the ability to stand strong in the face of adversity. These vital lessons are clearly applied to all professionals working in this new world.
Kris "Tanto" Paronto, Former Ranger, 2nd Battalion, 75th Regiment Security and Military Consultant, Hero of Benghazi Attack
- 12:30 – 1:30 p.m. **Networking Lunch**
Enjoy time with your colleagues as you discuss the morning's program before heading home.
- 1:30p.m. **Conference Adjourns**