

## CONFERENCE WORKING AGENDA

### TUESDAY, JUNE 28

- 10:30 a.m. **Conference Registration Opens with Vaccination Verification Station**
- 10:30 a.m. – 4:30 p.m. **Networking Lounge**  
Once guests are cleared at the vax verification station and pick up their conference badges, they are welcome to meet with colleagues mask free in our networking lounge.
- 12:00 to 1:30 p.m.  
T **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.
- 2:00 to 3:00 p.m. **Leveraging the *AM Forward* Initiative: Middle Market Advanced Manufacturing Investment Opportunities**  
Additive Manufacturing Forward (*AM Forward*) is a White House and voluntary compact among large manufacturers to help their smaller U.S.-based suppliers increase their use of additive manufacturing. The initiative promotes both OEM/supplier collaboration and additive manufacturing techniques in an effort to create resilience in the domestic supply chain. This unique partnership will also increase the effectiveness of government programs that aim to promote investment in cutting-edge technologies. We'll break up this discussion between the middle market companies to highlight investment opportunities and the larger companies to highlight demand.  
***Middle Market Panel:***  
***Neal Orringer, ASTRO America, Session Moderator***  
***Jonathan Cohen, MIMO Technik***  
***Brian Haggemiller, Sintavia***  
***Alan Pearce, Fastech LLC***  
***Brandon Soule, PrinterPrezz Inc.***  
***Joanna Zeleya, Chicago Precision***  
  
***Large Corporations Panel:***  
***Jason Gorey, ASTRO America, Session Moderator***  
***Tom Kennard, O'Neal Industries***  
***Brian Rosenberger, Lockheed Martin Corporation***  
***Anna Tomzynska, Boeing***
- 3:00 to 4:00 p.m. **SBIC Licensing and Operations: An Interview with Investment Division Management**  
The session will provide the most current information about SBIC licensing, the MAQ, and general operations.  
***Andrew Panzo, NewSpring Capital, Session Moderator***  
***Art Spivey, Director of Licensing, Office of Investment and Innovation***
- 4:00 to 4:30 p.m. **Networking Refreshment Break**  
Re-caffeinate, re-hydrate and refresh your connections between sessions.
- 4:30 to 5:30 p.m. **E is for "Expert"**  
**Challenges and Opportunities in ESG...According to the Experts**  
The nuts and bolts of establishing an ESG profile for your firm.  
***Stacey Wittelsberger, Patriot Capital, Session Moderator***  
***David Clauson, CHMM, CSP, FORVIS LLP***  
***Tom Goodrum, CFA, Credo ESG Solutions, Inc.***  
***Helee Lev, Conservice ESG***

5:30 to 7:00 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.

### WEDNESDAY, JUNE 29

7:30 a.m. **Conference Registration Opens**

7:45 to 9:00 a.m. **Networking Breakfast**  
Begin your day with a hearty breakfast and enjoy connecting with your fellow colleagues.

9:00 to 9:10 a.m. **Welcome and Sponsor Recognition**  
A warm welcome and special thanks to our sponsors from the regional president.  
*Andrew Panzo, NewSpring Capital, Northeast Regional President*

9:10 to 9:45 a.m. **SBA's Office of Investment and Innovation: An Update on the Investment Division's Accomplishments and Initiatives**  
With so much excitement and growth within the SBIC community, we're pleased to have the SBA's Associate Administrator in the Office of Investment and Innovation with us. Ms. DeVries will share the Division's accomplishments, initiatives, challenges, and opportunities.  
*Bailey DeVries, Associate Administrator, Office of Investment and Innovation, U.S. Small Business Administration*  
*Peter Huff, Blue Sage Capital, SBIA Chair*

9:45 to 10:30 a.m. **Help Wanted: A Micro View of Labor Issues**  
A Deloitte-Manufacturing Institute study estimates that as many as 2.1 million manufacturing jobs will go unfilled through 2030. And that's just the manufacturing sector of the economy. How are fund managers helping their portfolio company management teams manage today's crises in the workforce? Our speakers will share first-hand, from-the-trenches information and solutions for this phenomenon.  
*Joe Deluca, NewSpring Capital, Session Moderator*  
*Marilyn Adler, Mizzen Capital*  
*Dan Gross, AAVIN*  
*Heather Hubbard, Valesco Industries*  
*Dan Yardley, Patriot Capital*

10:30 to 11:00 a.m. **Special Session and Presentation with The Honorable Nydia Velázquez**  
Congresswoman Velázquez serves New York's 7<sup>th</sup> Congressional District and is the Chairwoman of the House Small Business Committee. She also serves as a senior member of the Financial Services Committee, and a member of the House Committee on Natural Resources. The Congresswoman will share her perspectives about current and prospective legislation affecting small business investments.  
*The Honorable Nydia M. Velázquez, U.S. House of Representatives*  
*New York 7<sup>th</sup> Congressional District*  
*Stacy Harmsen, Spell Capital Mezzanine*

11:00 to 11:30 a.m. **Networking Refreshment Break**  
Re-caffeinate, re-hydrate and refresh your connections between sessions.

- 11:30 a.m. to 12:30 p.m. **Keynote Presentation:**  
**Economic Trends, Global Trade, Supply Chain – What’s Ahead**  
Our speaker is a world-recognized author and expert on global business, trade policy, labor, and the latest economic trends. His op-eds have been nationally syndicated and his views have appeared in *The Wall Street Journal*, *New York Times*, *Bloomberg*, *NPR*, *Xinhua* (China), *La Jornada* (Mexico) and *Lianhe Zaobao* (Singapore). This session will delve into supply chain issues, examine U.S.- Chinese pressures, reveal how globalization is evolving, forecast economic growth, and explore pressing labor challenges. Importantly, it will provide strategies to reduce risks and prepare for what’s ahead.  
[John Manzella, johnmanzella.com](http://johnmanzella.com)
- 12:30 to 1:30 p.m. **Networking Lunch**  
Enjoy time with your colleagues as you discuss the morning’s program before heading home.
- 1:30 p.m. **Conference Adjourns**  
Thanks for coming, enjoy your weekend and mark your calendar to join us again next year back at the Lotte New York Palace, January 26 & 27, 2023.