

WORKING AGENDA

WEDNESDAY, APRIL 6TH

- 8:30 a.m. – 4:30 p.m. **CapitaLinx (*Invitation only, please.*)**
This event, modeled along the lines of SBIA's highly successful CapitaLinx at the National Summit, will have an equity focus and provide high quality, pre-scheduled, private GP-LP meetings.
- 12:00 – 1:30 p.m. **Women Investors Networking Luncheon (*Invitation only, please.*)**
An exclusive networking event for senior-level women **fund managers, limited partners and investment bankers.**
- 2:00 – 7:00 p.m. **Conference Registration**
Visit the conference registration desk to pick up your name badge and conference program.
- 3:00 – 4:00 p.m. **General Session**
Discussion that explores timely topics important to doing business in the lower middle market.
- 4:00 – 4:30 p.m. **Networking Refreshment Break**
Re-caffeinate, re-hydrate and refresh your connections between sessions.
- 4:30 – 5.30 p.m. **Limited Partner Panel Discussion**
Our panel of limited partners will share their perspectives on emerging trends in the lower middle market.
- 5:30 – 7:00 p.m. **Deal Maker's Winetasting Reception (*Conference Registrants only.*)**
Sample a variety of wines while networking with our select limited partner and investment banker table hosts. This informal reception allows you to circulate between tables and get to know all of the participating table hosts. Your next deal or capital source could be waiting at the next table!

THURSDAY, APRIL 7TH

- 7:45 – 9:00 a.m. **Networking Breakfast**
Rise and shine and get an early start on your networking with your fellow conference attendees.
- Limited Partners Networking Breakfast (*Invitation only, please.*)**
A unique opportunity for the industry's **Limited Partners** to network and discuss key issues affecting their investment decisions and opportunities at this LP-only breakfast.
- 9:00 – 9:10 a.m. **Welcome and Sponsor Thank You**
A warm welcome and special thanks to our sponsors from the regional president.
Tim Rafalovich, Wells Fargo, Western Region President

Western Private Equity Conference

April 6-7, 2022 | Balboa Bay Resort | Newport Beach, CA



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| 9:10 – 10:00 a.m. | Legislative and Regulatory Update
A review of critical legislative and regulatory issues that may impact private equity investors.
<i>Brett Palmer, President, Small Business Investor Alliance</i> |
| 10:00 – 11:00 a.m. | General Session
Discussion that explores timely topics important to doing business in the lower middle market. |
| 11:00 – 11:30 a.m. | Networking Refreshment Break
Catch up with the office or with your fellow attendees during this morning break. |
| 11:30 to 12:30 p.m. | Keynote Presentation |
| 12:30 – 1:30 p.m. | Networking Luncheon
No speakers, no formalities, just valuable networking with colleagues while enjoying a great meal. |
| 1:30 p.m. | Conference Adjournment |