

CONFERENCE WORKING AGENDA

TUESDAY, JUNE 28

- 12:00 p.m. **Conference Registration Opens with Vaccination Verification Station**
- 12:30 to 3:00 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.
- 12:30 to 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 to 4:00 p.m. **SBA Licensing and Operations: A Candid Interview with Investment Division Leadership**
A timely discussion with SBA's professional staff who lead the SBIC Program.
Andrew Panzo, NewSpring Capital, Session Moderator
Art Spivey, Director of Licensing, Office of Investment and Innovation (invited)
- 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, BKD National Enterprise Risk Solutions
- 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 10:00 a.m. **Washington Update: Looking Forward**
SBIA's Government Relations team will share their observations about legislative and regulatory developments along with inside information about the upcoming mid-term elections.
David Parkhurst, Small Business Investor Alliance
Tonnie Wybensinger, Small Business Investor Alliance

- 10:00 to 11:00 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? Are there practices emerging in terms of employee recruitment, incentives, and retention? Our speakers will share first-hand, from-the-trenches information and solutions for this phenomenon.
Joe Deluca, NewSpring Capital, Session Moderator
- 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, johnmazella.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.