

2023 WEST COAST CAPITAL SUMMIT

Paséa Hotel & Spa
Huntington Beach | CA
April 16 - 18, 2023

WORKING AGENDA

SUNDAY | APRIL 16TH

8:00 TO 11:00 A.M. **SBIA Board of Governors Meeting** (invitation-only)

11:00 A.M. – ON **Activities** (advanced registration and fee for participation)

- ✦ **Namaste Beach Day** – guided yoga session on Huntington Beach, just across the street from the hotel
- ✦ **Surfs Up School** – learn to surf on one of the most famous beaches in the world “Surf City” aka Huntington Beach
- ✦ **Pedal Time** – enjoy the sights of Huntington Beach on this relaxing, self-guided bike tour
- ✦ **Fore-ay into Golf** – hit the links at a beautiful SoCal course

2:00 TO 4:30 P.M. **Soft Skills Development**

The Society of Human Resource Management (SHRM) notes that 77% of HR professionals see that improving soft skills is key to their company's future and continued success. Whether it's creativity, emotional intelligence, collaboration, time management, or the art of persuasion, we all could use a little brushing up. Watch for details about our special sessions.

5:00 TO 6:30 P.M. **Welcome to the West Coast – Beach-style Reception**

Join us for the opening reception of our inaugural event! We will be outdoors on the Ocean Lawn and Terrace, with lovely views of the historic “Surf City” beach for this festive evening. No ties allowed.

6:30 P.M. – ON **Freestyle Dinner!**

Take a walk down the promenade and enjoy the nearby Huntington Beach hot spots. Your options are plenty.



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- 8:30 TO 9:30 A.M. Rise 'n Shine Networking Breakfast**
A great way to begin your day and get an early start on your networking, dining on the Ocean Lawn.
- 8:30 TO 9:30 A.M. Limited Partners Breakfast** (invitation only)
Enjoy breakfast while networking with your fellow limited partners on relevant issues facing the industry.
- 9:30 A.M. A Warm and Sunny Welcome**
A warm welcome and special thanks to our sponsors from the regional president.
Tim Rafalovich, Wells Fargo, SBIA Western Regional President
- 9:35 TO 10:30 A.M. The Capitol Connection**
Learn what's happening in the halls of Congress and within the regulatory bodies that impact your current and future investments.
Brett Palmer, President, Small Business Investor Alliance
- 10:30 TO 4:30 P.M. CapitalInx**
SBIA's unique GP-LP private meetings platform.
- 10:30 TO 11:00 A.M. Morning Energy Break**
Get a shot of caffeine, or power-up with fresh juice and smoothies, however you like it, get a little boost.
- 11:00 TO 12:00 P.M. Keynote Speaker**
Timely topic for PE professionals.
- 12:00 TO 1:00 P.M. Networking Luncheon**
No speakers, no formalities, just valuable networking with colleagues while enjoying a great meal.



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MONDAY | APRIL 17TH | CONTINUED

- 1:00 TO 2:00 P.M.** **Ocean Lawn Games**
Enjoy some interactive networking by participating in friendly, yet competitive lawn games. Featuring beach ball volleyball, ring toss, cornhole, putting challenge, bocce, giant Jenga and more. No expertise required, just jump right in, and make new connections.
- 2:00 TO 3:15 P.M.** **Afternoon Lightning Round**
Enjoy these two, fast-paced, back-to-back, 30-minute content sessions, with a brief intermission in-between.
- 3:30 TO 4:00 P.M.** **Afternoon Refreshment Break**
Break that afternoon energy slump by powering up with snacks and refreshments.
- 4:00 TO 4:45 P.M.** **Limited Partners' Perspectives**
An insightful panel discussion focused on critical areas limited partners are focusing on. A don't miss for all fund managers!
- 5:00 TO 6:30 P.M.** **Wine Tasting Networking Reception**
Enjoy this unique event, where our Limited Partners host tables featuring different varietals of wine. Beer and spirits will be available for those who would like to kick-back, relax and mingle with colleagues while enjoying the ocean view.
- 6:30 P.M. – ON** **Freestyle Dinner!**
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- 8:00 TO 11:30 A.M. CapitalInx**
SBIA's unique GP-LP private meetings platform.
- 8:00 TO 9:00 A.M. Here Comes the Sun Networking Breakfast**
Start your day off right with fortifying food and great company. Your next investor or co-investor may be in the seat right next to you!
- 9:00 TO 10:00 A.M. Keynote Speaker**
Timely topic for PE professionals.
- 10:00 TO 10:45 A.M. Break Time**
Re-caffeinate, re-hydrate and refresh your connections between sessions.
- 10:45 TO 11:45 A.M. General Session**
Timely topic for PE professionals.
- 12:00 TO 1:00 P.M. Networking Luncheon**
A casual lunch on Ocean Terrace, which offers the perfect time to discuss the highlights of the conference and touch base with colleagues before heading back to the office.
- 1:00 P.M. Conference Concludes**
- 2:00 TO 4:00 P.M. Bonus Networking Reception**
Have a few hours to spend before dashing off to your flight or just want to take in a little more time to network? Then join us for this post-event reception!
(Advanced registration and fee required.)

