

2023 WEST COAST CAPITAL SUMMIT

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

AGENDA

SUNDAY | APRIL 16TH

- 8:30 – 10:30 a.m.** **SBIA Board of Governors Breakfast and Meeting**
(Members of the Board only, please.)
- 10:00 a.m. – on** **Activities** *(Advanced registration and fee to participate.)*
- 10:00 a.m. – 12:00p.m.** **Surfs Up School** – learn to surf on one the most famous beaches in the world “Surf City” aka Huntington Beach.
- 11:00 a.m. – 1:00p.m.** **Pedal Time** – enjoy the sights of Huntington Beach on this relaxing, self-guided bike tour.
- 11:30 a.m. 4:00 p.m.** **Fore-ay into Golf – West Coast Capital Summit Golf Outing**
Strawberry Farms Golf Club combines the rural beauty and tranquility of the surrounding area with the challenge of true championship golf. As the premier golf course in Orange County, Strawberry Farms offers a challenging and fun location for golf enthusiasts and corporate groups alike. The 18-hole, par-71 course is set amid canyons and wetlands and offers stunning vistas across the 35-acre reservoir, and rolling greens surrounded by wildlife and natural vegetation. Boxed lunch and warm up 11:30a.m. First Tee-off, 12:00 p.m.
(Advanced registration required, please.)
- 11:30 a.m.– 1:30 p.m.** **WINC – Refreshed**
An Interactive Activity & Lunch
- 2:00 – 5:00 p.m.** **West Coast Capital Summit Networking Lounge**
The perfect place to meet with colleagues, old and new.



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3:00 – 4:30 p.m.

Soft Skills Development Sessions

Improving soft skills is key to a professional's continued success. Here are two sessions to consider.

3:00 – 3:45 p.m.

Sharpen Your Pitch – before heading to CapitaLinx – learn tips and tools to help present a memorable message clearly, concisely, and with a little flare, when presenting to prospective LPs.

3:45– 4:30 p.m.

Emotional Intelligence as Part of Your Leadership Role

Empathy, self-awareness, motivation, and social skills are teachable skills. Are you preparing your junior team members to succeed?

5:00 – 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 ... socks are optional.

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.

MONDAY | APRIL 17TH

8:00 – 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.

8:00 – 9:30 a.m.

Limited Partners Breakfast (invitation only, please.)

Enjoy breakfast while networking with your fellow Limited Partners on relevant issues facing the industry.

8:00 a.m. – 5:00 p.m.

West Coast Capital Summit Networking Lounge

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- 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 – 10:05 a.m.** **U.S. Small Business Administration – An Update from the Administrator**
The Honorable Isabel Guzman, Administrator, U.S. Small Business Administration (invited)
- 10:05 a.m. – 11:00 a.m.** **Keynote Speaker – To Be Announced Soon**
- 10:30 a.m. – 4:30 p.m.** **CapitalX**
SBIA's unique GP-LP private meetings platform.
- 11:00 – 11:30 a.m.** **Morning Energy Break**
Time for an energy boost and networking with colleagues.
- 11:30 a.m.– 12:30 p.m.** **Case Studies in Creative Financing: Brainstorming on Capital Structures to Close Deals**
- 12:30 – 1:30 p.m.** **Networking Luncheon**
No speakers, no formalities, just valuable networking with & colleagues while enjoying a great meal.
- 1:30 – 2:00 p.m.** **Ocean Lawn Networking Break**
It's time to take your shoes off during this interactive networking break. Join us for friendly, yet competitive games where no expertise is required. Just jump right in, take a mental break, and make new connections.



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2:00 – 3:15 p.m.

Concurrent Afternoon Power Rounds

Critical topics covered in fast-paced, back-to-back, 30 minute sessions, with a brief intermission in-between. Choose the issues you need to address.

2:00 – 2:30 p.m.

Succession Planning

Tim Rafalovich, Wells Fargo

Cybersecurity Threats Facing Today's Fund Manager

2:45 – 3:15 p.m.

Fundraising Opportunities and Challenges

Managing A Fund in Today's Hybrid Post Pandemic Environment

3:15 – 3:30 p.m.

Afternoon Refreshment Break

Break that afternoon energy slump by powering up with snacks and refreshments.

3:30 – 4:30 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 – 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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TUESDAY | APRIL 18TH

- 7:00 – 7:45 a.m.** **Namaste Beach Day** – guided yoga session overlooking Huntington Beach. *(Pre-registration requested, please.)*
- 8:00 a.m. – 12:00 p.m.** **West Coast Capital Summit Networking Lounge**
The perfect place to meet with colleagues, old and new.
- 8:00 – 11:30 a.m.** **Capitalinx**
SBIA's unique GP-LP private meetings platform.
- 8:00 – 9:00 a.m.** **Networking Breakfast – Soak Up a Little Sun**
A great way to begin your day and get an early start on your networking, dining on the Ocean Lawn.
- 8:00 – 9:00 a.m.** **Policy Breakfast for Lawyers and Accountants**
Policy discussions focused solely for SBIA members serving in legal and accounting capacities.
David Parkhurst, Small Business Investor Alliance
Therese Meers, U.S. Small Business Administration
- 9:00 – 9:30 a.m.** **Insights from the Investment Division's Leadership**
Learn what's on the horizon with the SBA's Investment Division
Bailey DeVries, Associate Administrator, Office of Investment and Innovation, U.S. Small Business Administration
- 9:30 – 10:30 a.m.** **The Capitol Connection**
Learn what's happening in the halls of Congress and within the regulatory agencies that impact your current and future investments.
Brett Palmer, President, Small Business Investor Alliance
- 10:30 – 11:00 a.m.** **Break Time**
Re-caffeinate, re-hydrate and refresh your connections between sessions.



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- 11:00 a.m. – 12:00 p.m.** **SBA Operations and Examinations**
Heath Morris, Office of Examinations, U.S. Small Business Administration
Paul Salgado, Operations, Office of Investment & Innovation, U.S. Small Business Administration
Art Spivey, Licensing & Operations, Office of Investment and Innovation, U.S. Small Business Administration
- 12:00 – 1:00 p.m.** **Networking Luncheon**
A casual lunch on the Ocean Terrace 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**
- 1:30 – 3:30 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, please.)

