

# 2025 WEST COAST CAPITAL SUMMIT

Fairmont Century Plaza  
Los Angeles | CA  
March 25-27, 2025

## AGENDA

### TUESDAY | MARCH 25

- |                               |  |
|-------------------------------|--|
| <b>8:00 – 11:00 a.m.</b>      | <b>SBIA Board of Governors Breakfast and Meeting</b><br><i>(Members of the Board only, please.)</i>  |
| <b>11:00 a.m. – 7:00 p.m.</b> | <b>West Coast Capital Summit Registration</b><br>Thank you for picking up your Summit credentials. We ask that name badges are worn at all times.  |
| <b>11:30 a.m.– 1:30 p.m.</b>  | <b>WINC – Top Chef Sushi</b><br>While the origins of sushi date back to the fourth century AD as a way to preserve fish, modern sushi is so much more. Under the guidance of our expert Chef, you'll dive into modern techniques and flavor profiles for delicious vegetarian creations. But this is WINC, so it wouldn't be complete without a little friendly competition! Get ready to roll, shape, and craft your way to sushi glory. Will your roll reign supreme?<br><i>(Separate registration is required, please.)</i> |
| <b>11:30 a.m.– 5:00 p.m.</b>  | <b>West Coast Capital Summit Networking Lounge</b><br>The perfect place to meet with colleagues, old and new. Light refreshments will be served.   |
| <b>2:00 – 5:00 p.m.</b>       | <b>Capitalinx</b><br>SBIA's unique GP-LP private meetings platform.  |
| <b>4:00 – 5:00 p.m.</b>       | <b>Independent Sponsors – An Update on the Western Market</b><br><b>Todd Morris, CFA, Managing Director, True West Capital Partners, Moderator</b>   |



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5:00 – 6:30 p.m.

## Welcome to LA! Networking Reception on the Plaza

A great time to connect with colleagues outdoors on the Century Plaza.

6:30 p.m. – on

## Dinner on Your Own

Enjoy the culinary delights that only LA can offer.

## WEDNESDAY | MARCH 26

7:30 a.m. – 7:00 p.m.

## West Coast Capital Summit Registration

Thank you for picking up your Summit credentials. We ask that name badges are worn at all times, please.

7:30 – 9:00 a.m.

## Rise 'n Shine Networking Professional's Breakfast

A great way to begin your day and get an early start on your networking.

7:30 – 9:00 a.m.

## Limited Partners - Washington Update and Breakfast

An exclusive update for Limited Partners that will include current legislative and regulatory issues affecting private equity investing.

**Brett Palmer, President, Small Business Investor Alliance**

*(By invitation only, please.)*

9:00 a.m. – 4:30 p.m.

## West Coast Capital Summit Networking Lounge

The perfect place to meet with colleagues, old and new.

9:00 a.m. – 4:30 p.m.

## Capitalinx

SBIA's unique GP-LP private meetings platform.

9:00 – 9:05 a.m.

## Welcome and Sponsor Thanks

A warm welcome and special thanks to our sponsors from the regional president.

**Rick Shuart, Managing Director, Caltius Structured Capital,  
SBIA Western Regional President**



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9:05 – 10:00 a.m.	<b>Keynote Speaker to be Announced</b>
10:00 – 10:30 a.m.	<b>Morning Energy Break</b> Time for an energy boost and networking with colleagues.
10:30 – 11:15 a.m.	<b>SBIC Compliance and Examinations: Avoiding the Common Pitfalls</b> <i>David Parkhurst, General Counsel, Small Business Investor Alliance, Moderator</i>
11:15 – 11:45 a.m.	<b>Refreshment Break</b> Grab a coffee and let's get back to work.
11:45 a.m.– 12:30 p.m.	<b>Cybersecurity Threats on the Horizon - The Criminals are Getting Smarter</b> <i>Stefan Okhuysen, Partner, HCAP Partners, Moderator</i> <i>Michael Malone, CEO, Lumifi Cybersecurity</i>
12:30 – 2:00 p.m.	<b>Professionals Networking Luncheon</b> No speakers, no formalities, just valuable networking with & colleagues while enjoying a great meal.
2:00 – 2:45 p.m.	<b>Understanding AI – both Generative and Predictive Are You Using Them Correctly to Increase Productivity?</b> <i>Sheila Emami, Vice President, St. Cloud Capital LLC, Moderator</i>
2:45 – 3:30p.m.	<b>Networking Break</b> Beat that afternoon energy slump with snacks.



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3:30 – 4:30 p.m.

**Fundraising Today – Limited Partners Share Their Observations and Recommendations**  
*Michael Jones, Managing Director, Corbel Capital Partners, Moderator*

*Will Hodgeson, CFA, Investment Manager, University of Michigan*

*Tim Rafalovich, Head of Fund Investing Division, Wells Fargo*

*Francesco Sala, VP and Director of Investments, Everside*

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.

6:30 p.m. – on

## **Freestyle Dinner on Your Own**

## **THURSDAY | MARCH 27**

7:30 a.m. – 12:30 p.m.

## **West Coast Capital Summit Registration**

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7:30 – 9:00 a.m.

## **Policy Breakfast for Lawyers and Accountants**

A special discussion and networking just for legal and accounting professionals.

*David Parkhurst, General Counsel, Small Business Investor Alliance*

7:30 – 9:00 a.m.

## **Networking Breakfast**

A great way to begin your day and get an early start on your networking.



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8:00 – 10:30 a.m.	<b>West Coast Capital Summit Networking Lounge</b> The perfect place to meet with colleagues, old and new.
8:00 – 10:30 a.m.	<b>Capitalix</b> SBIA's unique GP-LP private meetings platform.
9:00 – 10:00 a.m.	<b>Today's M&amp;A Market – What's Around the Corner?</b> <i>Amanda Kim, Principal, Avante Capital Partners, Moderator</i>
10:00 – 10:30 a.m.	<b>Break Time</b> Re-caffeinate, re-hydrate and refresh your connections between sessions.
10:30 – 11:30 a.m.	<b>Washington Update</b> <i>Brett Palmer, President, Small Business Investor Alliance</i>
11:30 a.m. – 12:30 p.m.	<b>Networking Luncheon</b> A casual lunch with colleagues before heading back to the office.
12:30 p.m.	<b>Conference Concludes</b>

