

# Southern Private Equity Conference

February 19-20, 2026 | JW Marriott Nashville | Nashville, TN



## WORKING AGENDA 13 FEBRUARY 2026

### THURSDAY, FEBRUARY 19

8:30 a.m. **Conference Registration Opens**  
Symphony Pre-Function Visit the conference registration desk to pick up your name badge. Your badge is required for admittance to all sessions and conference spaces.

9:00 a.m. – 12:30 p.m. **Open Meeting Networking**  
Symphony CD Plan ahead and make the most of your time! Use the Conference App to schedule meetings and connect at designated networking tables. Enjoy complimentary refreshments and a light lunch while building meaningful relationships that matter.

11:00 a.m. – 12:30 p.m. **WINC Nashville Custom Hat Bar**  
Powell Room Saddle up for a stylish twist on networking! Join fellow members of the Women Investors Networking Council (WINC) for a custom cowboy hat-making experience. You'll design your own bespoke hat while mixing and mingling with other attendees. (Please watch for registration details.)

12:30 p.m. – 1:30 p.m. **Insight Exchange and Lunch**  
Symphony EF Enjoy a light lunch as you meet with colleagues at specially hosted tables for candid discussions about:

- **SBIC Licensing FAQs and Disclosures: Advice from Experts**  
*Led by: David Parkhurst General Counsel SBIA*
- **SBIC Portfolio Management and Operations** *Led by: Paul Salgado, Office of Investment and Innovation, U.S. Small Business Administration*
- **SBIC Examinations**  
*Led by: Michael Donadieu, Office of Investment and Innovation, U.S. Small Business Administration*
- **Industry Mentors: Seasoned Fund Managers Share Best Practices**  
*Led by: Charles Cox, Partner & Head of Business Development LongueVue Capital*

1:30 – 4:30 p.m. **Open Meeting Networking**  
Symphony CD Use the Conference App to schedule meetings and connect at designated networking tables.

3:00 – 3:05 p.m. **Welcome to Our General Session. Help us Thank Our Sponsors**  
Symphony AB A warm welcome and special thanks to our sponsors from the regional council chair.  
**Simon Haidamous, Managing Director, Genesis Park, Southern Regional Council Chair**

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3:05 – 3:45 p.m.  
Symphony AB

## Speed Round: Performance Economics, Alignment and Terms When Working with Independent Sponsors

The candid skinny about how fund managers collaborate with Independent Sponsors—and make it work.

***Kenneth Saffold, Managing Partner, o15 Capital Partners, Moderator***

***Mark Hollis, Senior Partner, Centerfield Capital Partners***

***Tyson Smith, CFA, Partner, Tecum Capital***

***Kevin Speight, Principal, Plexus Capital***

***Tim Welles, Managing Partner, Pine Street Capital Partners***

***Spalding White, Managing Partner, Route 2 Capital Partners***

3:45 – 4:30 p.m.  
Symphony CD  
and Pre-Function

## Networking Refreshment Break

Re-caffeinate, re-hydrate and refresh your connections between sessions.

4:30 – 5:30 p.m.  
Symphony AB

## Inside Edition: What LPs Want to Know About Your Fund

Our distinguished speakers will explore how today's market environment is reshaping LP decision-making. What is portfolio-level data revealing about DPI compression across SBIA vintages? Learn how different LPs are setting their priorities in terms of recalibrating liquidity, IRR and NAV durability trade-offs. How are LPs pressure-testing valuation methodologies? This is a must attend session.

***Val Phillips, Executive Director, Wells Fargo Strategic Capital, Moderator***

***Drew Healy, SBIC Investments Director/Sponsor Finance, Pinnacle Financial Partners***

***Nate Kirk, Founder & Managing Partner, Everside***

5:30 – 7:00 p.m.  
Symphony  
Pre-Function

## Welcome to Music City Networking Reception

Southern hospitality and networking at its best. Enjoy great conversation, refreshing cocktails, and the perfect setting to connect and unwind with colleagues.

## FRIDAY, FEBRUARY 20

7:30 a.m.  
Symphony  
Pre-Function

## Conference Registration Opens

Visit the conference registration desk to pick up your name badge. Your badge is required for admittance to all sessions and conference spaces.

7:45 – 9:00 a.m.  
Symphony EF

## Networking Breakfast

Begin your day with a hearty breakfast and enjoy connecting with your fellow colleagues.

7:45 – 9:00 a.m.  
Holston Room

## Legal and Accounting Policy Breakfast

A special networking and policy session for SBIA's legal and accounting community. (By invitation, please.)

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

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| 8:00 – 11:15 a.m.<br>Symphony CD                      | <b>Open Meeting Networking</b><br>More time to meet with colleagues and find that next deal.   |
| 9:00 – 9:30 a.m.<br>Symphony AB                       | <b>Welcome Back and Association Update</b><br>A look at the day ahead and a review of the SBIA's goals for 2026.<br><b>Simon Haidamous, Managing Director, Genesis Park,<br/>Southern Regional Council Chair</b><br><b>Brett Palmer, President, Small Business Investor Alliance</b>   |
| 9:30 – 10:30 a.m.<br>Symphony AB                      | <b>Healthcare Investments: Valuable Dos and Don'ts for 2026</b><br>PWC advises, "Healthcare private equity deal activity, which showed an uneven rebound through 2025, is expected to become more consistent in 2026, as lower interest rates, abundant dry powder, and LP demand for liquidity begin to unlock the backlog of delayed transactions from the 2018-2022 cycle." Join our discussion about trends, anticipated compliance demands, emerging digital health regulations, and the critical role that AI will play as it drives efficiency and opportunity.<br><b>John Pontius, Managing Director, Capital Alignment Partners,<br/>Moderator</b><br><b>John Allgood, Managing Director, Brentwood Capital Advisors</b><br><b>David Bertani, Director, Sponsor Finance – Commercial Healthcare Banking, Hancock Whitney</b><br><b>Caroline Ducas, Partner, Resolute Capital Partners</b> |
| 10:30 – 11:15 a.m.<br>Symphony CD<br>and Pre-Function | <b>Networking Break</b><br>Re-caffeinate and reconnect during this intermission between sessions.  |
| 11:15 – 11:45 p.m.<br>Symphony AB                     | <b>Exclusive Conversation with the SBA's Deputy Administrator</b><br>A unique opportunity to hear from the Agency.<br><b>The Honorable William Briggs, Deputy Administrator,<br/>U.S. Small Business Administration (invited)</b><br><b>Brett Palmer, President, Small Business Investor Alliance</b>  |
| 11:45 a.m. – 12:30 p.m.<br>Symphony AB                | <b>SBA's Office of Investment and Innovation Chief: Welcome and Update</b><br>The OII's chief will provide an update on the department's objectives and initiatives for the year.<br><b>Josh Carter, Associate Administrator, Office of Investment and<br/>Innovation, U.S. Small Business Administration</b><br><b>Simon Haidamous, Managing Director, Genesis Park,<br/>Southern Regional Council Chair</b>  |
| 12:30 – 1:30 p.m.<br>Symphony EF                      | <b>Networking and Lunch</b><br>Before heading home, join colleagues for a light lunch and just a bit more networking.  |
| 1:30 p.m.   | <b>Conference Adjourns</b><br>We look forward to seeing you in Santa Monica for the<br><b><u>West Coast Capital Summit   April 15-17, 2026</u></b>   |