

2026 WESTERN CAPITAL SUMMIT

Fairmont Miramar Hotel & Bungalows
Santa Monica | California
April 15-17, 2026

Conference Working Agenda: 17 March 2026

Wednesday, April 15

11:30 a.m. – 2:00 p.m.

WINC: An Exclusive Tour of the Santa Monica Pier

Join the Women's Investor Networking Council (WINC) for a valuable opportunity. After enjoying a light brunch and networking at the Fairmont Miramar, the group will take an exclusive tour of the iconic Santa Monica Pier. Originally built in 1909, the Pier has seen amazing transformations through the years and remains a National Historic Landmark. Separate registration required, please.

2:00 – 5:00 p.m.

SBIA Board of Governors Meeting

(Members of the Board only, please.)

3:30 – 6:30 p.m.

Conference Registration

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

4:00 – 5:00 p.m.

Limited Partners Roundtable Discussions

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.)

5:30 – 6:30 p.m.

Early Arrivals Networking Reception

A great opportunity to get an early start on your networking and connect with fellow attendees. On your own for dinner to explore what culinary delights Santa Monica offers.

6:30 – 8:30 p.m.

Limited Partners Dinner

Enjoy dinner and private conversation with colleagues.
(By invitation only, please.)

6:30 p.m. – on

Dinner on Your Own



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Thursday, April 16

7:30 a.m. – 7:00 p.m.

Conference Registration

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8:00 – 9:00 a.m.

Rise 'n Shine Networking Professional's Breakfast

Join colleagues for networking and eggs. This breakfast will also feature two special tables for those interested in talking about SBICs. Join the "Ask Art" table for free flow discussions about licensing or the "Ask Paul" table for the latest information on SBIC fund operations and portfolio management.

Paul Salgado, Director, Portfolio Management, Office of Investment and Innovation, U.S. Small Business Administration
Art Spivey, Director of Licensing, Office of Investment and Innovation, U.S. Small Business Administration

9:00 a.m. – 3:30 p.m.

Open Meeting Networking

Maximize your networking time! Schedule meetings in advance or in real time by using the Conference App and connect at pre-assigned tables.

9:00 a.m. – 3:30 p.m.

CapitalLinx

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 council chair.

Todd Morris, Managing Director, True West Capital Partners
SBIA Western Regional Council Chair

9:05 – 10:00 a.m.

Key Investment Thesis Themes: Investing in Critical Industries—from Rare Earth Minerals to Residential Home Services

Dulce Martinez, Head of Investor Coverage, Zions Capital Markets, Moderator
Sheila Emami, Principal, St. Cloud Capital LLC

10:00 – 10:30 a.m.

Morning Energy Break

Time for an energy boost and networking with colleagues.



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Thursday, April 16 (continued)

10:30 – 11:15 a.m.

Fund Manager Identification and Due Diligence: LP Observations and Best Practices

Brian Yoon, Managing Director, Corbel Capital Partners,
Moderator

Ted Bojorquez, Senior Vice President Fund Finance, City National
Bank

Moritz Poehl, Founder and Managing Partner, Everside

Tim Rafalovich, Head of Fund Investing Division-Private Equity,
Wells Fargo

11:15 – 11:45 a.m.

Refreshment Break

Grab a coffee and let's get back to work.

11:45 a.m.– 12:30 p.m.

Evaluating Strong Management Teams: Proven Approaches from Experienced GPs

Gavin Bates, Managing Director, Caltius Structured Capital,
Moderator

John Dahlgren, Head of Talent, SBJ Capital

James Hickey, Managing Partner and President, Interim Leaders,
McDermott & Bull

Peter Huff, Founding & Managing Member, Blue Sage Capital

Peter Zucker, Independent Management Consultant

12:30 – 2:00 p.m.

Professionals Networking Luncheon

No speakers, no formalities, just valuable networking with
colleagues while enjoying a great meal.

2:00 – 3:00 p.m.

AI: Transforming Workflow for Your Fund and Your PortCos

Enhanced deal flow, confident due diligence and
predictive portfolio company performance—are just the tip
of the iceberg when PE fund managers become proficient
using AI tools. This session explores just how today's
successful funds are embracing and using AI in their daily
activities.

Keith Jensen, President, Cadre AI

3:00 – 3:30 p.m.

Networking Break

Beat that afternoon energy slump with snacks.



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Thursday, April 16 (continued)

3:30 – 4:30 p.m.

The AI Revolution:

A Candid Conversation with an AI Pioneer

Chris Malachowsky didn't just witness the AI revolution – he helped build the technology that powers it. As co-founder of NVIDIA, Chris was instrumental in shaping the technologies and guiding the expansion of a startup conceived at a Denny's restaurant in San Jose, California, into a company now valued at over \$4 trillion. In this fireside chat, Chris will share his perspective on the computing revolution, where AI infrastructure is heading, and how companies can build AI solutions.

Chris Malachowsky, Founder & Fellow, Nvidia

Tom Niehaus, Co-Founder, Pivotal Capital

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

Friday, April 17

7:30 a.m. – 12:30 p.m.

Conference Registration

Thank you for wearing your name badge at all times.

7:30 – 9:00 a.m.

Policy Breakfast for Lawyers and Accountants

Time dedicated to legal and accounting professionals. (By invitation, please.)

Brett Palmer, President, Small Business Investor Alliance

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.

8:00 – 10:30 a.m.

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9:00 – 10:00 a.m.

Economic Outlook

Scott Anderson serves as BMO's Chief U.S. Economist and Managing Director. He analyzes and forecasts U.S. national and regional economic trends, and regularly authors reports on prominent U.S. economic issues, monetary policy actions, and bank lending and credit conditions. He also leads periodic regional outlook reports on California and other regions. An invaluable session not to be missed.

Scott Anderson, PhD., Chief Economist and Managing Director, BMO

10:00 – 10:30 a.m.

Break Time

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

10:30 – 11:15 a.m.

SBA Office of Investment and Innovation: An Update from the Associate Administrator

Josh Carter, Associate Administrator, Office of Investment and Innovation, U.S. Small Business Administration

David Kocen, Managing Member, Bluehenge Capital Partners, SBIA SBIC Council Chair

11:15 a.m. – 12:00 p.m.

Washington Review and Independent Sponsor Performance Update

Brett Palmer, President, Small Business Investor Alliance

12:00 – 1:00 p.m.

Networking Luncheon

A casual lunch with colleagues before heading home or back to the office.

1:00 p.m.

Conference Concludes

We look forward to seeing you in Chicago at the Midwest Deal Summit | May 27-28, 2026

