

Northeast Private Equity Conference
January 21-22, 2026 | Lotte New York Palace | New York, NY



CONFERENCE WORKING AGENDA 19 JANUARY 2026

WEDNESDAY, JANUARY 21

8:30 a.m. **Conference Registration Opens**
Check in at the registration desk to receive your name badge. Your name badge is required for admittance to all sessions and conference spaces.

9:00 a.m. – 4:30 p.m. **Open Meeting Networking**
Plan ahead! Use the Conference App to book meetings and connect at pre-assigned networking tables. Enjoy complimentary refreshments and a light lunch while you build valuable relationships.

11:30 a.m. - 2:00 p.m. **WINC Activity – MoMA and Modern Women**
Learn about women artists and their lasting influence. This tour will feature work by women artists on view as part of the Museum's Collection Galleries, spanning from 1880 to today. Featured artists on the tour may include Frida Kahlo, Helen Frankenthaler and Ana Mendieta. The guided tour will examine work across different mediums and discuss the context and legacy of these works. Light refreshments will be served at the hotel before the tour. *(Advanced registration required, please.)*

3:30 – 3:45 p.m. **Welcome to Our General Session**
A warm welcome and opening remarks from the regional council chair and SBIA President.
Seth Friedman, Managing Director, Abacus Finance
Northeast Regional Council Chair
Brett Palmer, President, Small Business Investor Alliance

3:45 - 4:15 p.m. **A Special Conversation with a Member of the President's Cabinet**
Join us to learn about the Administration's plans for the Agency and American Small Business.
The Honorable Kelly Loeffler, Administrator, U.S. Small Business Administration
Brett Palmer, President, Small Business Investor Alliance

4:15 – 4:45 p.m. **Networking Refreshment Break**
Take a moment to re-energize and reconnect with peers over light refreshments.



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4:45 - 5:30 p.m.

A Look Ahead: LP Perspectives on the 2026 Investing Environment

A timely conversation about investment activity and allocations from top SBIC investors. How are GPs differentiating themselves in such a competitive environment? What are LPs looking for in potential fund investments? How do you build and maintain effective GP-LP relationships? Don't miss this valuable discussion.

Michael Lasch, Managing Partner, Pine Street Capital, Moderator

Matthew Maciaszek, Assistant Portfolio Manager, Alternative Investments, Kemper Corporation

Fitz Smoak, CFA, CAIA, Sr. Investment Research Analyst, HB Wealth

Scott Stoveken CFA, Head of SBIC Investments, BNY

Paige Walker, Manager - CRA Investments, Ally Bank

5:30 - 7:00 p.m.

Finding Deals and Building Networks Cocktail Reception

Kick off the year with meaningful connections! Join us for an evening of cocktails and conversation at the Northeast's premier networking event—where deals begin and relationships grow.

THURSDAY, JANUARY 22

7:30 a.m.

Conference Registration Opens

Check in at the registration desk to receive your name badge. Your name badge is required for admittance to all sessions and conference spaces.

7:30 - 9:00 a.m.

Networking Breakfast

Enjoy a full buffet breakfast while connecting with industry colleagues.

7:30 - 9:00 a.m.

Policy Breakfast for Lawyers and Accountants

Policy discussions designed for SBIA legal and accounting members who serve the industry. (By invitation, please.)

Justin Pelletier, Head of Government Relations, Small Business Investor Alliance

9:00 - 9:05 a.m.

Welcome and Sponsor Recognition

Seth Friedman, Managing Director, Abacus Finance Northeast Regional Council Chair

9:05 – 10:00 a.m.

Speed Panel: Timely Updates and Predictions by Each SBIA Industry Vertical - SBICs, PE Funds, Limited Partners, Independent Sponsors and Investment Banks

Dan Gaspar, Partner, TZP Group, Moderator

Richard Baum, Managing Partner, Consumer Growth Partners

Kerri Hagen, Managing Director, Cascadia Capital

Sean McGuire, Managing Director, Fifth Third Bank

Peter Rothschild, Managing Partner, RF Investment Partners LLC

Neil Shah, Partner, Brookside Capital Partners



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10:00 - 10:45 a.m.

Networking Refreshment Break

Recharge and reconnect during this break between sessions.

10:45 – 11:30 a.m.

CEO Confidential: Observations on Pre and Post Investment Decisions

A unique opportunity to hear directly from experienced CEOs on the negotiating and investment process.

Steve Gord, Partner, Hidden River Strategic Capital, Moderator

Marina Gregory, CEO, Catalyst MXE

Garrett Taylor, CEO, Coastline Wealth Management

Chris Whitney, Founder & CEO, Miles Ahead Brands

11:30 a.m. – 12:30 p.m. **Update from SBA's Investment Division Chief**

An introductory conversation with SBA's newly appointed leader of the Office of Investment and Innovation to learn about the Administration's SBIC priorities and initiatives.

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

Brett Palmer, President, Small Business Investor Alliance

12:30 - 1:00 p.m.

Networking Lunch: Grab & Go or Stay and Connect

Grab a quick bite for the road or stick around to share lunch and insights with colleagues.

1:00 p.m.

Conference Adjourns

We look forward to seeing you in Nashville for the

Southern Private Equity Conference | February 19-20, 2026