

# 2025 WEST COAST CAPITAL SUMMIT

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

## AGENDA

### TUESDAY | MARCH 25

- 8:00 – 11:00 a.m.**                      **SBIA Board of Governors Breakfast and Meeting**  
*(Members of the Board only, please.)*
- 11:30 a.m.– 1:30 p.m.**                **WINC Activity**
- 12:00 – 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.
- 1:00 – 5:00 p.m.**                        **West Coast Capital Summit Networking Lounge**  
The perfect place to meet with colleagues, old and new.
- 2:00 – 5:00 p.m.**                        **Capitalinx**  
SBIA's unique GP-LP private meetings platform.
- 4:00 – 5:00 p.m.**                        **Independent Sponsors – An Update on the Western Market**  
*Todd Morris, CFA, Managing Director, True West Capital Partners, Session Moderator*
- 5:00 – 6:30 p.m.**                        **Welcome to LA! Networking Reception on the 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**  
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- 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*
- 9:05 – 10:00 a.m.**      **Keynote Speaker to be Announced**
- 10:00 – 10:30 a.m.**      **Morning Energy Break**  
Time for an energy boost and networking with colleagues.
- 10:30 – 11:15 a.m.**      **SBIC Compliance and Examinations:  
Avoiding the Common Pitfalls**  
*David Parkhurst, General Counsel, Small Business Investor Alliance, Session Moderator*
- 11:15 – 11:45 a.m.**      **Refreshment Break**  
Grab a coffee and let’s get back to work.



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- 11:45 a.m.– 12:30 p.m.**      **Cybersecurity Threats on the Horizon - The Criminals are Getting Smarter**
- 12:30 – 1:45 p.m.**      **Professionals Networking Luncheon**  
No speakers, no formalities, just valuable networking with & colleagues while enjoying a great meal.
- 1:45 – 2:30 p.m.**      **Understanding AI – both Generative and Predictive Are You Using Them Correctly to Increase Productivity?**  
*Sheila Emami, Vice President, St. Cloud Capital LLC, Session Moderator*
- 2:30 – 3:00 p.m.**      **Networking Break**  
Beat that afternoon energy slump with snacks.
- 3:00 – 3:45 p.m.**      **General Session Topic or Speaker**
- 3:45 – 4:45 p.m.**      **Fundraising Today – Limited Partners Share Their Observations and Recommendations**  
*Michael Jones, Managing Director, Corbel Capital Partners, Session Moderator*
- 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**



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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.

**8:00 – 10:30 a.m.**

## **West Coast Capital Summit Networking Lounge**

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

**8:00 – 10:30 a.m.**

## **CapitalInx**

SBIA's unique GP-LP private meetings platform.

**9:00 – 10:00 a.m.**

## **General Session**

**10:00 – 10:30 a.m.**

## **Break Time**

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

**10:30 – 11:30 a.m.**

## **Washington Update**

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

**11:30 a.m. – 12:30 p.m.**

## **Networking Luncheon**

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

**12:30 p.m.**

## **Conference Concludes**

