

2025 WEST COAST CAPITAL SUMMIT

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

AGENDA

TUESDAY | MARCH 25

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| 8:00 – 11:00 a.m. | SBIA Board of Governors Breakfast and Meeting <i>(Members of the Board only, please.)</i> |
| 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. |
| 3:00 – 4:00 p.m. | General Session with Timely Discussions |
| 4:00 – 4:30 p.m. | Refresh and Network – It's Time for a Break Join us for coffee or a cool soft drink as we gear up for the next session. |
| 4:30 – 5:30 p.m. | General Session with Timely Discussions |
| 5:30 – 6:30 p.m. | Welcome to LA! Networking Reception on the Plaza |
| 6:30 p.m. – on | Dinner on Your Own – Enjoy What LA Offers |



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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.
- 7:45 – 9:30 a.m.** **Rise 'n Shine Networking Professional's Breakfast**
A great way to begin your day and get an early start on your networking.
- 7:45 – 9:30 p.m.** **Limited Partners Breakfast**
(By invitation, please.)
- 8:00 a.m. – 5:00 p.m.** **West Coast Capital Summit Networking Lounge**
The perfect place to meet with colleagues, old and new.
- 8:00 a.m. – 5:00 p.m.** **Capitalinx**
SBIA's unique GP-LP private meetings platform.
- 9:30 – 9:35 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
- 9:35 – 10:30 a.m.** **Keynote Speaker to be Announced**
- 10:30 – 11:00 a.m.** **Morning Energy Break**
Time for an energy boost and networking with colleagues.
- 11:00 a.m.– 11:30 a.m.** **General Session with Timely Discussions**
- 11:30 – 11:45 a.m.** **Micro-Break**
Grab a coffee and let's get back to work.



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| 11:45 a.m.– 12:30 p.m. | General Session with Timely Discussions |
| 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. | General Session with Timely Discussions |
| 3:00 – 3:30 p.m. | Networking Break Beat that afternoon energy slump with snacks. |
| 3:30 – 5:00 p.m. | General Session with Timely Discussions |
| 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

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| 7:00 a.m. – 12:00 p.m. | West Coast Capital Summit Registration Thank you for picking up your Summit credentials. We ask that badges are worn at all times, please. |
| 7:45 – 9:00 a.m. | Policy Breakfast for Lawyers and Accountants <i>(By invitation, please.)</i> |
| 7:45 – 9:00 a.m. | Networking Breakfast A great way to begin your day and get an early start on your networking. |
| 8:00 – 11:30 a.m. | West Coast Capital Summit Networking Lounge The perfect place to meet with colleagues, old and new. |



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| 8:00 – 11:30 a.m. | CapitalInx SBIA's unique GP-LP private meetings platform. |
| 9:00 – 10:15 a.m. 9:30-9:45 9:45-10:15 | Morning Power Sessions – Topic to be Announced Transition Break Topic to be Announced |
| 10:15 – 11:00 a.m. | Break Time Re-caffeinate, re-hydrate and refresh your connections between sessions. |
| 11:00 a.m. – 12:00 p.m. | Washington Update <i>Brett Palmer, President, Small Business Investor Alliance</i> |
| 12:00 – 1:00 p.m. | Networking Luncheon A casual lunch with colleagues before heading back to the office. |
| 1:00 p.m. | Conference Concludes |

