



Northeast Private Equity Conference

January 8-9, 2025 | Lotte New York Palace | New York, NY

CONFERENCE WORKING AGENDA

WEDNESDAY, JANUARY 8

- 9:00 a.m. **Conference Registration Opens**
- 9:00 a.m. – 4:30 p.m. **Networking - Two Lounges This Year!**
Join colleagues early in either of our two networking areas for valuable one-on-one meetings. Refreshments and a light lunch will be available.
- 11:30 - 2:00 p.m. **WINC Activity – The Guggenheim**
The Guggenheim building was designed by renowned and celebrated architect Frank Lloyd Wright and is widely considered his most memorable work. Our tour will be led by one of ART SMART's art historians who knows the latest exhibitions, understands their critical reviews, and has in-depth historical research to share. The Guggenheim Museum boasts incredible works of art but also fascinating architecture. One of its most iconic features is its spiral ramp that leads to a skylight dome. Light refreshments will be served at the hotel after the tour. *(Separate registration required, please.)*
- 3:00 – 3:45 p.m. **SBA's Investment Division Chiefs – Current Issues and Plans for the Year Ahead**
As a new administration gets organized, the key department chiefs in the Office of Investment and Innovation continue their diligent work within the SBIC program. This first of the year session will provide an update on SBIC licensing, portfolio management, and examinations.
David Kocen, Founding Partner, Bluehenge Capital Partners, Moderator
Mike Donadieu, Acting Director of Examinations, Office of Investment and Innovation, U.S. Small Business Administration
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
- 3:45 - 4:30 p.m. **Networking Refreshment Break**
- 4:30 - 5:30 p.m. **Positioned for Growth? An Economic Outlook for 2025**
A fresh outlook for major sectors of the economy, inflation and interest rates. Our speaker's perspectives have been shared regularly in *The Wall Street Journal*, Bloomberg News, and on National Public Radio. Her work has also been published in major academic journals.
Shannon Grein, Vice President & Economist
Wells Fargo Corporate & Investment Banking
- 5:30 - 7:00 p.m. **Finding Deals and Building Networks Cocktail Reception**
Join us for the Northeast's most iconic networking event ... 65 years of history can't be wrong.

THURSDAY, JANUARY 9

- 7:30 a.m. **Conference Registration Opens**
- 7:30 - 9:00 a.m. **Networking Breakfast**
Enjoy a full buffet breakfast with colleagues.



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- 7:30 - 9:00 a.m. **Policy Breakfast for Lawyers and Accountants**
Policy discussions designed for SBIA members who serve exclusively in legal and accounting capacities. *(By invitation, please.)*
David Parkhurst, General Counsel, Small Business Investor Alliance
Justin Pelletier, Executive Director Government Relations, Small Business Investor Alliance
- 9:00 - 9:05 a.m. **Welcome and Sponsor Recognition**
Steve Gord, Hidden River Strategic Capital, Northeast Regional President
- 9:05 – 10:00 a.m. **SBA Leadership Update and Outlook**
As time winds down for the leader of SBA's Office of Investment and Innovation, Bailey DeVries will share her perspectives on public service, the status of SBIC Program, and how she plans to help her successor build on the program's recent growth.
Bailey DeVries, Associate Administrator, Office of Investment and Innovation, U.S. Small Business Administration
Brett Palmer, President, Small Business Investor Alliance
- 10:00 - 10:45 a.m. **Networking Refreshment Break**
- 10:45 – 11:30 a.m. **New Year, New Fundraising Strategies**
According to SS&C Intralinks 2025 LP Global Survey, "LPs reported that private equity outperformed other asset classes over the last 12 months. PE's success in a higher rate environment bodes well for the rest of the decade." As LPs determine their allocations, how does 2025 look for the lower middle market?
Tyson Smith, Founding Partner, Tecum Capital Partners, Moderator
Jan Bergeson, Executive Director & CRA Officer, Ally Bank
Matthew Jipson, Director, Fifth Third Bank
Kevin Prunty, Senior Managing Director, LongWater Capital Solutions
- 11:30 a.m. - 12:30 p.m. **Washington Update: The 119th Congress and What Private Equity Can Expect**
Even though congressional committees are still forming, SBIA's President will provide validated insight and some inside skinny on what the private equity community can expect.
Brett Palmer, President, Small Business Investor Alliance
- 12:30 - 1:00 p.m. **Grab & Go Refreshments**
Off to the train station? The airport? Grab a light bite for your journey home.
- 1:00 p.m. **Conference Adjourns**
We look forward to seeing you in Nashville for the Southern Private Equity Conference
February 13-14, 2025