

2026 WESTERN CAPITAL SUMMIT

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

Conference Working Agenda: 4 February 2026

Wednesday, April 15

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.

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

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

Start the day strong with meaningful networking.



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Thursday, April 16 (continued)

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| 9:00 a.m. – 4:30 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. – 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 council chair.
<i>Todd Morris, Managing Director, True West Capital Partners</i>
<i>SBIA Western Regional Council Chair</i> |
| 9:05 – 10:00 a.m. | Fund Manager Identification and Due Diligence:
LP Observations and Best Practices
<i>Brian Yoon, Managing Director, Corbel Capital Partners, Moderator</i> |
| 10:00 – 10:30 a.m. | Morning Energy Break
Time for an energy boost and networking with colleagues. |
| 10:30 – 11:15 a.m. | Timely Topic to be Announced |
| 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
<i>Gavin Bates, Managing Director, Caltius Structured Capital, Moderator</i> |
| 12:30 – 2:00 p.m. | Professionals Networking Luncheon
No speakers, no formalities, just valuable networking with colleagues while enjoying a great meal. |



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Thursday, April 16 (continued)

2:00 – 3:00 p.m.

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

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

3:00 – 3:30 p.m.

Networking Break

Beat that afternoon energy slump with snacks.

3:30 – 4:30 p.m.

**Strategic Technologies and the Emerging Impact of AI
A Keynote Address**

Chris Malachowsky co-founded NVIDIA in 1993. He is a senior technology executive and has played a crucial role in shaping NVIDIA's technologies and guiding its expansion from a startup to a leader in accelerated computing. His leadership at NVIDIA spans IT, operations, product engineering, and, most recently, directing the company's research efforts. NVIDIA develops advanced chips, systems, and software for AI applications, enabling companies to build their own AI solutions.

Chris Malachowsky, Founder & Fellow, Nvidia

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

A special discussion and networking event designed for legal and accounting professionals.

Brett Palmer, President, Small Business Investor Alliance
David Parkhurst, General Counsel, Small Business Investor Alliance



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Friday, April 17 (continued)

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 – 11:00 a.m.

Open Meeting Networking

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8:00 – 11:00 a.m.

CapitaLinx

SBIA's unique GP-LP private meetings platform.

9:00 – 10:00 a.m.

Economic Outlook

Speaker to be announced soon

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 Review and Independent Sponsor Performance 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 home or back to the office.

12:30 p.m.

Conference Concludes

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

