

**NVCA Strategic Operations & Policy Summit**  
**November 1-2, Washington, D.C.**  
**Agenda**

**WEDNESDAY, NOVEMBER 1**

*Capitol Visitor Center*  
*First St NE*  
*Washington, DC 20515*

**6:00-9:00 PM**

**NVCA Welcome Reception, Dinner, and Leadership Development (1 CPE Credit)**

Welcome reception with NVCA President & CEO Bobby Franklin followed by a seated dinner and unconscious bias training.

**Bobby Franklin**, President & CEO, NVCA

**Carissa Romero**, Partner, Paradigm

**THURSDAY, NOVEMBER 2**

*Proskauer Rose*  
*1001 Pennsylvania Ave NW, Suite 600*  
*Washington, DC 20004*

**7:30-8:00 AM**

**Continental Breakfast**

**8:00-9:30 AM**

**Valuations: The Current State of Affairs in Auditing Fair Values for Venture Funds (1.5 CPE Credits)**

**Part I:** Review of auditing standards and audit approach to valuations.

**Kyle Burrell**, Partner, EY

**Maggie Baker**, Partner, EY

**Part II:** Discussion reviewing several case studies with authors of the AICPA Task Force audit guide.

**David Larsen**, Managing Director, Duff & Phelps

**Amanda Miller**, Executive Director, EY

**Tim Curt**, Managing Director, Warburg Pincus


**9:30-10:30 AM**

**Raising Your Next Fund? (1 CPE Credit)**

Hear from a variety of LPs on how they're viewing the VC asset class, what they focus on in diligence, and what they're looking for.

**Gentiana Arovas**, Director of Investment Operations, Smithsonian Institution

**Kristi Craig**, Director of Private Markets, Georgetown University Investment Office



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**Brittany Hargest**, Vice President, Greenspring Associates  
**Dana Johns**, Senior Portfolio Manager, Maryland State Retirement & Pension System  
**Howard Beber**, Partner, Proskauer (moderator)

**10:30-10:45 PM – Break**

**10:45-11:45 PM**

**What's Going on in Washington? (1 CPE Credit)**

The NVCA Policy Team will provide an overview of what's going on in Washington as it relates to the entrepreneurial ecosystem. Hear what the current landscape is on comprehensive tax reform, immigration reform, capital markets and regulatory issues.

**Jeff Farrah**, Vice President of Government Affairs, NVCA  
**Justin Field**, Vice President of Government Affairs, NVCA  
**Charlotte Savercool**, Director of Government Affairs, NVCA

**11:45-12:15 – Lunch**

**12:15-1:15 PM**

**Regulatory: SEC Exam Environment and Growing Expectations for ERAs (1 CPE Credit)**

- SEC exam priorities and SEC document request lists.
- If you do get examined what should you expect and are you prepared to reply to the SEC in the given time frame?
- Changes in the ERA rules/ ADV filings.
- Trickle down effect for ERAs – what are the growing expectations from LPs and how you can prepare with your compliance manual.

**Josh Newville**, Partner, Proskauer  
**Denise Marks**, CFO, SV Health Investors  
**Marty Eng**, CFO – VP of Administration, Western Technology

**1:15-2:15 PM**

**How to Be a Better Strategic Partner at Your Firm (1 CPE Credit)**

Our panel of veteran CFOs will discuss how to leverage your expertise to help your firm navigate the challenges around cybersecurity, accounting for portfolio companies, ILPA reporting template, and more.

**Sue Biglieri**, CFO, Kleiner Perkins Caufield & Byers  
**Jim Stewart**, CFO, True Ventures  
**Pat Reilly**, Principal and CFO, Technology Crossover Ventures  
**Brian Borders**, Founder, Borders Law Group (moderator)

**2:15-2:30 PM – Break**

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**2:30-3:00 PM**

**Compliance & Financial Reporting Costs Group Therapy: Analyzing the Impact with Data (0.5 CPE Credits)**

NVCA VP of Research Maryam Haque will review the data results and key trends from the NVCA Compliance & Financial Reporting Costs survey.

**Maryam Haque**, Vice President of Research & Strategic Engagement, NVCA

**3:00-4:00 PM**

**Tax Policy (1 CPE Credit)**

A conversation about what's going on with tax reform in Washington, how it could impact the ecosystem, and what recent changes in tax policy have already impacted the venture industry?

**Justin Field**, Vice President of Government Affairs, NVCA

**Cathy Koch**, Americas Tax Policy Leader, EY