

NVCA 2018 Strategic Operations & Policy Summit Agenda

WEDNESDAY, OCTOBER 24, 2018 | 1 CPE CREDIT HOUR

Location: 918 F St NW Washington, DC (National Union Building)

6:00-8:30 PM

Reception, Dinner, and “Midterms in the Age of Disruption” Presentation

Welcome reception with Bobby Franklin followed by top D.C. political strategists Bruce Mehlman and David Castagnetti who will present what to expect in the 2018 midterm elections.

Bobby Franklin, President & CEO, NVCA

David Castagnetti, Co-Founder, Mehlman Castagnetti

Bruce Mehlman, Founder, Mehlman Castagnetti

THURSDAY, OCTOBER 25, 2018 | 7 CPE CREDIT HOURS

Location: 918 F St NW Washington, DC (National Union Building)

7:30 AM

BREAKFAST

8:00-9:00 AM

Expanding the CFO/LP Relationship

Mix of LP types discussing how they view the VC asset class – diligence standards, benchmarking, approach for direct investments in portfolio companies—price negotiation, reporting, interpretation of credit and IRR and more.

Howard Beber, Partner, Proskauer (Moderator)

George Brooke, Private Equity Analyst, National Railroad Retirement Investment Trust

Alex Pessala, Principal, Middleland Capital

Andrew Salembier, Partner and COO, Accolade Partners

9:00-10:00 AM

Back Office Operations Best Practices

Learn how seasoned CFOs have tackled topics such as: structuring, financial reporting, what LPs are asking for, portfolio company services, tax planning, and more.

Kelli Cullinane, Partner & CFO, Legacy Venture

Nina Labatt, COO, General Partner, Trinity Ventures

Jim Stewart, CFO, True Ventures

Anuja Royan, Managing Director, Finance, Mithril Capital Management

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10:00-10:30 AM

BREAK

10:30-11:30 AM

Cryptocurrency Considerations for VC Operators

What are regulatory, tax, accounting and audit considerations? What are key issues around existence/valuation? Are there outsourced solutions coming out?

Maggie Baker, Partner, EY

Mike Fitzgerald, CEO, Digital Asset Custody Co.

Susan Gault-Brown, Partner, Morrison Foerster (moderator)

Joel Monegro, Partner, Placeholder Ventures

Augie Wilkinson, Director of Portfolio Monitoring & Analysis, Bessemer Venture Partners

11:30 AM-12:00 PM

LUNCH

12:00-1:00 PM

AICPA Valuations Lunch Discussion

Overview of NVCA's recent comments on the AICPA Valuations Guide, discussion on what VCs are hearing from their auditors and any "real world" consequences already we can share?

Brian Borders, Founder, Borders Law Group (moderator)

David Larsen, Managing Director, Duff & Phelps

Denise Marks, Chief Administrative Partner, SV Health Investors

Amanda Miller, National Valuation Financial Reporting Solutions Leader, EY

1:00-2:00 PM

Year 2 of Tax Reform

Policy and practitioner perspectives. Now that we have the new tax bill, how do we implement it?

Justin Field, Senior Vice President, Government Affairs, NVCA

Jeremy Naylor, Partner, Proskauer

Navin Sethi, Partner, EY

2:00-3:00 PM

Strategic Leadership Opportunities (Veteran CFO Panel)

Veteran CFOs will discuss fund succession planning, fundraising lessons, the role of the CFO in the culture of the firm, and more.

Tim Curt, Managing Director, Warburg Pincus (moderator)

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Dana Kibler, Partner & CFO, Upfront Ventures

Kristen Laguerre, Managing Director of Finance, MPM Capital

Jennifer Naylor, CFO, Cultivian Sandbox Ventures

Brian Regan, Managing Director & CFO, Spectrum Equity

3:00-3:15 PM

BREAK

3:15-4:15 PM

What's going on in Washington?

The NVCA Policy Team will review recent advancements in the JOBS Act 3.0/RIA VC Exemption Deal Language and Explanation and New Foreign Investment Law and its Implications for Venture Capital.

Justin Field, Senior Vice President, Government Affairs, NVCA

Jeff Farrah, General Counsel, NVCA

Charlotte Savercool, Director of Government Affairs, NVCA

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