

2022 NVCA STRATEGIC OPERATIONS & POLICY SUMMIT ATTENDEE GUIDE

Alison Connors

CFO - Third Rock Ventures

Email: alison@thirdrockventures.com

Location: Boston, MA

AUM: \$3.8B

Number of funds: 6

Number of portfolio companies: 60

Investment stage: Early seed - Sr. A

Current systems used: Investran, Intralinks

Amy McCullough

CFO - Fulcrum Equity Partners

Email: am@fulcrumep.com

Location: Atlanta, GA

AUM: \$617M

Number of funds: 4

Number of portfolio companies: 29

Investment stage: Growth Equity

Current systems used: Allvue

Anthony Voveris

Director of Finance - Epidarex Capital

Email: anthony@epidarex.com

Location: Bethesda, MD

AUM: \$220M

Number of funds: 4

Number of portfolio companies: 26

Investment stage: Seed

Current systems used: Quickbooks/Microsoft Suite/Zoho

Advisers used: PwC, BDO, Goodwin Procter

Augie Wilkinson

Director of Portfolio Monitoring and Analysis - BVP

Email: augie@bvp.com

Location: New York, NY

AUM: \$20B

Number of funds: 4

Number of portfolio companies: 400+

Investment stage: All stages

Current systems used: Investran, Salesforce, Affinity, Deal Cloud

Advisers used: Big 4

Bill Park

CFO – Crosscreek Advisors

Email: bpark@crosscreek.vc

Location: Salt Lake City, UT

AUM: \$1.2B

Number of funds: 12

Number of portfolio companies: 30

Investment stage: Late

Advisers used: KPMG, Dorsey

Blake Koriath

CFO – High Alpha

Email: blake@highalpha.com

Location: Indianapolis, IN

AUM: \$400M

Number of funds: 3

Number of portfolio companies: 61

Investment stage: Pre-seed - Series B

Brian Draves

Partner & COO - Ten Eleven Ventures

Email: bdraves@1011vc.com

Location: Bay Area

AUM: \$1B

Number of funds: 4

Number of portfolio companies: 40

Investment stage: Agnostic

Current systems used: Xero (accounting), DealCloud (pipeline) and Colbalt (portfolio monitoring)

Advisers used: Aduro

Brian Schwenk

CFO/CCO - 1315 Capital

Email: brian.schwenk@1315capital.com

Location: Philadelphia, PA

AUM: \$950M

Number of funds: 4

Number of portfolio companies: 24

Investment stage: Growth

Current systems used: AllVue, DealCloud

Advisers used: Pryor Cashman, Kroll

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Cassandra Reilly
Director of Tax - Bessemer Venture Partners

Email: cassandra@bvp.com
Location: Larchmont, NY
AUM: \$15B

Cathryn Paine
Principal, People - Anzu Partners

Email: crp@anzupartners.com
Location: Washington, DC
AUM: ~\$1B
Number of funds: 3
Number of portfolio companies: 38
Investment stage: A

Chad Gardner
CFO and Managing Director - Energy Innovation Capital

Email: chad.gardner@eicfunds.com
AUM: ~\$400MM
Number of funds: 3
Number of portfolio companies: 30
Investment stage: Seed, Venture, Growth
Current systems used: ArkPES, QuickBooks, Sevanta, bill.com,
Advisers used: Standish

Connie Paiement
CFO/CLO/CCO - OnePrime Capital LLC

Email: Connie@oneprimecapital.com
Location: Palo Alto, CA
AUM: \$750M
Number of funds: 19
Number of portfolio companies: 24-50
Investment stage: Later
Current systems used: Quickbooks, Excel, Digify
Advisers used: IQEQ, Morgan Lewis, Frank Rimerman

Darren Smith
Senior Finance Manager – Toyota Ventures

Email: darren@toyota.ventures
Location: San Francisco, CA
AUM: \$500M+
Number of funds: 5
Number of portfolio companies: 64
Investment stage: Seed / Early
Current systems used: AtomInvest, Workday, G-Suite
Advisers used: Silicon Legal Strategy

Dave Mackey
CFO - Catalyst Health Ventures

Email: dmackey@chv.vc
Location: Boston, MA
AUM: \$100-500M
Number of funds: 3
Number of portfolio companies: 21
Investment stage: Early
Current systems used: Allvue

David Arnstein
Managing Director and CFO - Venture Investors LLC

Email: david@ventureinvestors.com
Location: Madison, WI and Ann Arbor, MI
AUM: \$275M
Number of funds: 6
Number of portfolio companies: 23
Investment stage: Early-stage
Current systems used: Quickbooks
Advisers used: BDO and Gunderson

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David Hite

Managing Partner - B37 Ventures

Email: david@b37.vc

Location: San Francisco, CA

AUM: \$125M

Number of funds: 2

Number of portfolio companies: 23

Investment stage: Series A and B

Advisers used: Frank, Rlmerman (audit/tax); HC Global (fund admin; Sklar Kirsh (legal); Simon Compliance

Debrah Herman

Partner, CFO - Anzu Partners

Email: debrah@anzupartners.com

Location: DC, San Diego, MA, Tampa

AUM: \$1.3B

Number of funds: 3 plus multiple SPVs

Number of portfolio companies: ~40

Investment stage: Start ups

Advisers used: VMS/Aduro

Eric Amanfoh

Partner, Finance - JumpStart Inc.

Email: Eric.amanfoh@jumpstartinc.org

Location: Cleveland, OH

AUM: < 100Million

Number of funds: 7

Number of portfolio companies: 92

Investment stage: PreSeed, Seed

Current systems used: Diligent

Jim Stewart

COO - True Ventures

Email: Jim@trueventures.com

Location: Bay Area - SF and Palo Alto

AUM: \$3.8B

Number of funds: 12

Number of portfolio companies: 200+

Investment stage: Early Seed Stage

Current systems used: Quick Books, Excel, Bill.com, Expensify - (tried EFront with a poor outcome)

Advisers used: EY, PWC Gunderson Detmer, Goodwin, Greyline (IQEQ)

Joaquin Goquiolay

Portfolio Associate - Veteran Entrepreneur Fund Bravo LP

Email: joaquin.goquiolay@penfed.org

Location: Washington, DC

AUM: \$10M

Number of funds: 2

Number of portfolio companies: 18

Investment stage: Early/Series A

Joe Emmanuel

CFO - NewRoad Capital Partners

Email: joe@newroadcp.com

Location: Rogers, AR

Number of funds: 4

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Jonathan Schalliol

Finance & Operations Lead - HG Ventures

Email: jon@hg.ventures

Location: Indianapolis, IN

AUM: Not Disclosed (\$50 MM Investment Annually)

Number of funds: 1 (Balance Sheet)

Number of portfolio companies: 30

Investment stage: Pre-Seed to Growth

Julieanna Wiley

VP Finance - Savano Capital Partners

Email: julieanna@savanocapital.com

Location: Baltimore, MD

Investment stage: Growth

Kristen Laguerre

CFO, COO - MPM Capital

Email: klaguerre@mpmcapital.com

Location: Boston, MA

AUM: \$3.5B

Number of funds: 7 fund families + strategic funds

Number of portfolio companies: 75

Investment stage: Early

Current systems used: outsourced - AllVue; Dealcloud

Advisers used: KPMG (audit), E&Y (tax), Ropes & Gray (partnership counsel), ACA (compliance)

Kristin Drew

CFO - CapitalG

Email: kbelanger@capitalg.com

Location: California

AUM: >\$5B

Number of funds: 6

Number of portfolio companies: 60

Investment stage: Growth

Lisa Lee

CFO - ForgePoint Capital

Email: llee@FORGEPOINTCAP.com

Location: San Mateo, CA

AUM: \$1B

Number of funds: 3

Number of portfolio companies: 38

Investment stage: Early

Current systems used: Cobalt

Mandy Elder

VP of Finance - Arboretum Ventures

Email: aelder@arboretumvc.com

Location: Ann Arbor, MI

AUM: \$900M

Number of funds: 6

Number of portfolio companies: 27

Investment stage: Early-Mid

Current systems used: QuickBooks, Excel, Carta (LP Portal)

Advisers used: Cooley (Counsel), PwC (Tax), Plante Moran (Audit)

Marcy Marshall

CFO - Arboretum Ventures

Email: mmarshall@arboretumvc.com

Location: Ann Arbor, MI

AUM: \$900M

Number of funds: 6

Number of portfolio companies: 27

Investment stage: Early-Mid

Current systems used: QuickBooks, Excel, Carta (LP Portal)

Advisers used: Cooley (Counsel), PwC (Tax), Plante Moran (Audit)

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Marinda Luk

CFO - Initialized Capital

Email: marinda@initialized.com

Location: San Francisco, CA

AUM: \$1.6B

Number of funds: 9

Number of portfolio companies: 300+

Investment stage: Seed

Current systems used: Allvue

Advisers used: Gunderson, Standish, Sensiba, Cooley

Matt Goldstein

Head of Finance & Operations - Calm Company Fund

Email: matt@calmfund.com

Location: Remote

AUM: \$15M

Number of funds: 3

Number of portfolio companies: 70

Investment stage: Early stage/seed stage

Advisers used: Aduro Advisors, Carney Badley Spellman, CohnReznick

Melissa Waystack

SVP Finance - Lowercarbon Capital, LP

Email: melissa@lowercarboncapital.com

Location: Jackson, WY

Mike Leurdijk

Senior Vice President, Portfolio Management - In-Q-Tel, Inc.

Email: mleurdijk@iqt.org

Location: Arlington, VA

Number of portfolio companies: ~400

Investment stage: A/B

Current systems used: Sage, Dynamo, PE View, iLevel, PowerBI

Nathan Apsel

CFO - Paradigm

Email: Nathan@paradigm.xyz

Location: San Francisco, CA

Nicole Stiles

Chief Operating Officer - How Women Invest

Email: nicole@howwomenlead.com

Number of funds: 2

Number of portfolio companies: 14

Investment stage: Early seed, Late seed, Series A & B

Current systems used: Salesforce, Airtable

Pat Reilly

CFO - Headline

Email: pat@headline.com

Location: San Francisco, CA

AUM: \$4B

Number of funds: 25

Number of portfolio companies: 150

Investment stage: Early and Growth

Current systems used: Cobalt, Aumni

Advisers used: Cooley, BDO, E&Y, Ultimus Leverpoint

Prashant Gangwal

CFO - Altos Ventures Management

Email: prashant@altos.vc

Location: Burlingame

AUM: \$10B

Number of funds: 20

Number of portfolio companies: 130

Investment stage: Early stage and crossover

Current systems used: Allvue

Advisers used: Standish, PWC, and BDO

Qing Wang

Director, Finance - Yamaha Motor Ventures, Inc

Email: qing@ymvsv.com

Location: Palo Alto, CA

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Randy Guttman

Partner & COO - JMI Equity

Email: rguttman@jmi.com

Location: DC / Baltimore / San Diego

AUM: \$5bb

Number of funds: Investing out of Fund XI

Number of portfolio companies: 43

Investment stage: Growth Equity

Current systems used: Dynamo, PE View, iLevel

Advisers used: K&E, Goodwin, Proskauer, Deloitte, EY

Ravi Singh

CFO - Oak HC/FT

Email: ravi@oakhcft.com

Location: Stamford, CT

AUM: \$5.3B

Number of funds: 5

Number of portfolio companies: 80+

Investment stage: Early and Growth Stage

Robyn Lehman

CFO - ABS Capital Partners

Email: rlehman@abscapital.com

Location: Washington, DC

AUM: \$1.2B

Number of funds: 8

Number of portfolio companies: 17

Investment stage: Growth Capital

Current systems used: Microsoft Dynamics, Salesforce

Sascha Rosebush

General Counsel - Third Rock Ventures

Email: srosebush@thirdrockventures.com

Location: Boston, MA and San Francisco, CA

AUM: \$3.8B

Number of funds: 6

Number of portfolio companies: 60

Investment stage: Early

Scott Holton

CFO – Next Frontier Capital

Email: scott@nextfrontiercapital.com

Location: Bozeman, MT

AUM: \$145M

Number of funds: 3

Number of portfolio companies: 49

Investment stage: Seed + and pre-growth

Current systems used: Carta and VMS

Advisers used: Carta, RSM, Cooley

Spencer Punter

Chief Operating Officer - DCVC

Email: spencer@dcvc.com

Location: Palo Alto, CA

AUM: \$3B

Number of funds: 11

Number of portfolio companies: 300+

Investment stage: Seed and Early Stage

Current systems used: Investran (via fund admin), Cobalt, Aumni, Affinity

Advisers used: AlterDomus (Fund Admin), Gunderson (Fund and Mgmt Co Legal), BDO (fund audit)

Steve Glover

CFO - Pelion Venture Partners

Email: steve@pelionvp.com

Location: Salt Lake City, UT

Number of portfolio companies: 65

Investment stage: Series A, Seed

Steve Schwen

CFO - Ventana Capital

Email: steve@vensanacap.com

Location: Minneapolis, MN

AUM: \$550M

Number of funds: 2

Number of portfolio companies: 16

Investment stage: Early and Growth

Current systems used: Investran/SungardDX

Advisers used: alterDomus (admin), Gunderson (legal), IQEQ - Greyline (compliance), KPMG (audit), Deloitte (tax)

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Sue Biglieri

CFO - Kleiner Perkins

Email: sbiglieri@kpcb.com

Location: Saratoga

Number of funds: 50

Number of portfolio companies: 350

Investment stage: Early

Current systems used: Investran

Zach Johnson

VP - Frist Cressey Ventures

Email: zjohnson@fcventures.com

Location: Nashville, TN

AUM: \$375M

Number of funds: 3

Number of portfolio companies: 25

Investment stage: Early

Tom Hoban

COO - G Squared

Email: tom@gsquared.com

Location: Chicago/San

Francisco/Greenwich/Miami/Zurich

AUM: \$2B

Number of funds: 3 active

Number of portfolio companies: ~30-50 per fund

Investment stage: Growth, 3-5 years from IPO

Current systems used: Backstop, Perfona, Tipalti, Carta, Trakstar

Advisers used: GoodwinProctor, BDO, Apex

Vince Nicchi

Controller - ClearSky

Email: vince.nicchi@clear-sky.com

Location: West Palm Beach, FL

AUM: \$900,000

Number of funds: 3 Master, 3 Feeder, 2 Side Cars, 1 Aggregator

Number of portfolio companies: 64 Unique (33 Active, 31 Exited)

Investment stage: Series A-C

Current systems used: Investran, Intralinks InvestorVision, S&P iLevel/Qval, Carta (Cap tables)

Advisers used: Mintz Levin (Legal), PwC (tax and audit), Leverpoint (Fund Admin)